

U.S. Department of Housing and Urban Development
Office of Public and Indian Housing

PHA Plans for the Housing Authority of the City of Sherman

5 Year Plan for Fiscal Years 2005 - 2009
Annual Plan for Fiscal Year 2005

**NOTE: THIS PHA PLANS TEMPLATE (HUD 50075) IS TO BE COMPLETED IN
ACCORDANCE WITH INSTRUCTIONS LOCATED IN APPLICABLE PIH NOTICES**

PHA Plan Agency Identification

PHA Name: *Housing Authority of the City of Sherman*

PHA Number: *TX078*

PHA Fiscal Year Beginning: (mm/yyyy) *04/2005*

Public Access to Information

Information regarding any activities outlined in this plan can be obtained by contacting: (select all that apply)

- ☒ Main administrative office of the PHA
- ☐ PHA development management offices
- ☐ PHA local offices

Display Locations For PHA Plans and Supporting Documents

The PHA Plans (including attachments) are available for public inspection at: (select all that apply)

- ☒ Main administrative office of the PHA
- ☐ PHA development management offices
- ☐ PHA local offices
- ☐ Main administrative office of the local government
- ☐ Main administrative office of the County government
- ☐ Main administrative office of the State government
- ☐ Public library
- ☐ PHA website
- ☐ Other (list below)

PHA Plan Supporting Documents are available for inspection at: (select all that apply)

- ☒ Main business office of the PHA
- ☐ PHA development management offices
- ☐ Other (list below)

5-YEAR PLAN
PHA FISCAL YEARS 2005 - 2009

[24 CFR Part 903.5]

A. Mission

State the PHA's mission for serving the needs of low-income, very low income, and extremely low-income families in the PHA's jurisdiction. (select one of the choices below)

☐ The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.

☒ The PHA's mission is:

The Housing Authority's mission is to serve the needs of low-income, very low income and extremely low-income families in the PHA's jurisdiction and to (1) increase the availability of decent, safe and affordable housing in its communities;(2) ensure equal opportunity in housing; (3) promote self-sufficiency and asset development of families and individuals; and (4) improve community quality of life and economic viability. The Housing Authority will strive for improvement of the physical conditions of housing developments; to continually upgrade the management and operations of the public housing agency, while developing and enhancing a stronger, healthier and viable economic initiative-related to low income housing assistance; and to include any other housing opportunities available to public housing or assisted residents.

Progress Statement: During FYB 2004 the Housing Authority's efforts to improve the physical conditions and operations of housing developments included the construction of a laundry room at the Hoard Site next to the community center, additional parking for the employees and the public. New weather stripping and thresholds installed for Scott Circle site; and installation of ceiling fans at the scattered site properties. In addition, to upgrade the management operations of the PHA staff received training on the latest regulations. The PHA has continued the practice of reviewing and/or updating policies on a regular basis.

B. Goals

The goals and objectives listed below are derived from HUD's strategic Goals and Objectives and those emphasized in recent legislation. PHAs may select any of these goals and objectives as their own, or identify other goals and/or objectives. Whether selecting the HUD-suggested objectives or their own, **PHAS ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF SUCCESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS.** (Quantifiable measures would include targets such as: numbers of families served or PHAS scores achieved.) PHAs should identify these measures in the spaces to the right of or below the stated objectives.

HUD Strategic Goal: Increase the availability of decent, safe, and affordable housing.

☒ PHA Goal: Expand the supply of assisted housing

Objectives:

- ☐ Apply for additional rental vouchers:
- ☒ Reduce public housing vacancies:
- ☒ Leverage private or other public funds to create additional housing opportunities: *Develop non-profit by 3/31/02*
- ☐ Acquire or build units or developments (*removed*) *not attainable*
- ☒ Other (list below)
 - *Develop and expand partnerships and funding resources*

Progress Statement: *During FYB 2004 the board of commissioners passed a resolution creating the Sherman Housing Opportunities Corporation, a non-profit agency.*

☒ PHA Goal: Improve the quality of assisted housing

Objectives:

- ☒ Improve public housing management: (PHAS score) *Improve physical condition score by 10%*
- ☐ Improve voucher management: (SEMAP score)
- ☐ Increase customer satisfaction:
- ☐ Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections)
- ☒ Renovate or modernize public housing units: *298 units*
- ☐ Demolish or dispose of obsolete public housing:
- ☐ Provide replacement public housing:
- ☐ Provide replacement vouchers:
- ☐ Other: (list below)

Progress Statement: *During FYB 2004, the PHA has worked towards completing all work items scheduled in the Capital Fund Program. The PHA has remained on target with the objectives reflected above.*

☒ PHA Goal: Increase assisted housing choices

Objectives:

- ☐ Provide voucher mobility counseling:
- ☐ Conduct outreach efforts to potential voucher landlords
- ☐ Increase voucher payment standards
- ☐ Implement voucher homeownership program:
- ☒ Implement public housing or other homeownership programs:
Assist 10 residents each year to be prepared to become homeowners.
- ☐ Implement public housing site-based waiting lists:
- ☐ Convert public housing to vouchers:
- ☐ Other: (list below)

Progress Statement: During FYB 2004, we have continued the practice of offering programs to residents that each money management and budgeting as these are essential to becoming a responsible homeowner.

HUD Strategic Goal: Improve community quality of life and economic vitality

- ☒ PHA Goal: Provide an improved living environment
- Objectives:
- ☐ Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments:
 - ☒ Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments: *This is an on-going activity. PHA will maintain a balanced income mix in our public housing development.*
 - ☐ Implement public housing security improvements:
 - ☐ Designate developments or buildings for particular resident groups (elderly, persons with disabilities)
 - ☐ Other: (list below)

Progress Statement: During FYB 2004 we have continued to maintain well balanced income mix in our public housing development.

HUD Strategic Goal: Promote self-sufficiency and asset development of families and individuals

- ☒ PHA Goal: Promote self-sufficiency and asset development of assisted households
- Objectives:
- ☒ Increase the number and percentage of employed persons in assisted families: *Increase by 3% each fiscal year.*
 - ☒ Provide or attract supportive services to improve assistance recipients' employability: *This is an on-going activity. Maintaining 5 types of assistance.*
 - ☐ Provide or attract supportive services to increase independence for the elderly or families with disabilities.
 - ☐ Other: (list below)

Progress Statement: During FYB 2004, the PHA has continued to offer support to families wanting to improve their chances of becoming employable. The participation in the GED, ESL, literacy and computer classes offered at the Community Center has continued to increase.

HUD Strategic Goal: Ensure Equal Opportunity in Housing for all Americans

☒ PHA Goal: Ensure equal opportunity and affirmatively further fair housing

Objectives:

- ☒ Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability: *This is an on-going activity. PHA sponsors fair housing seminars.*
- ☐ Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability:
- ☐ Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required:
- ☐ Other: (list below)

Progress Statement: During FYB 2004, the PHA has continued to make this an on-going activity. Fair housing information flyers have been made available.

Other PHA Goals and Objectives: (list below)

Planning and Administration

☒ PHA Goal: Knowledge of New Laws and Changes in Housing Issues

Objective:

- ☒ Make staff and board members knowledgeable as needed regarding the new housing requirements of the Quality Housing and Work Responsibility Act of 1998 (H.R. 4194); and (any other laws and changes) as they occur regarding housing, community, and economic development. *This is an on going activity. Notices are distributed to staff and board members as soon as they have been received at the HA.*
- ☒ On an ongoing basis, the Executive Director, or designee, shall identify and secure available training opportunities for staff and the board as needed.

☒ PHA Goal: Up-to-Date Policies--New, Revised or Reviewed

Objective:

- ☒ To ensure continued policy reviews, revisions or the development of new policies for the provision of services described under the Housing Act of 1937 and the Quality Housing and Work Responsibility Act of 1998 (H.R. 4194) provide for comment by the residents and by the public and approval by the appropriate entity. *This is an on-going activity.*
- ☒ The Executive Director or designee will ensure review of existing policies and procedures to incorporate all necessary requirements and if warranted, develop written recommendations for policy revisions to the Board of Commissioners. The PHA may contract with professionals for these services. *This is an ongoing activity.*

Progress Statement: During FYB 2004, the PHA Board of Commissioners adopted the Revised Admissions and Occupancy Policy (12/17/03); Russell Dwelling Lease (12/17/03); Revised Termination and Eviction Policy (12/17/03); Revised Grievance

☒ **PHA Goal: Profit/Loss Ratio**

Objective:

- ☒ To determine the Profit/Loss Ratio of separate activities of the PHA; to determine the feasibility of continuing services, needed program modifications, and or identify financial needs. This information will be presented during the planning process for each annual housing plan. *This is an on-going activity.*
- ☒ The PHA, as needed, may determine the profit/loss ratio's of the programs administered by the PHA. The PHA will review the Profit/Loss statements to determine if anticipated increases in revenue or decreases in expenses are obtained.
- ☒ As needed, the PHA may obtain or provide a feasibility study for the continuation of services from each entity and/or programs presented for consideration of funding. This study will be provided to the Executive Director and/or appropriate staff persons to determine the feasibility and/or funding levels of these activities.

PHA Strategic Goal: Financial Resources

☒ **PHA Goal: Management Resources**

Objective:

- ☒ To ensure that resources are managed in a manner which generate a positive cash flow and provides for an accumulation of income-over expenses and maintains an adequate reserve account for future housing needs for low-income persons. *This is an on-going activity.*
- ☒ The PHA shall obtain assistance in providing written financial management and investment of funds procedures that comply with applicable regulatory requirements to be approved by the Board of Commissioners. *This will be done as needed.*
- ☒ This objective may be measured by the completion of evaluation of said policies and procedures and approval of policies and procedures and/or modifications by the Board of Commissioners. *This is an on-going activity.*

PHA Strategic Goal: Housing Management Services

- ☒ PHA Goal: Continued Operation and Administration of Housing Units
- Objective:
- ☒ To provide for the continued administration of housing units developed under the 1937 Housing Act according to policies and procedures. *This is an on-going activity.*
 - ☒ On an ongoing basis, the PHA In-Take Department will provide for program marketing, outreach and the acceptance and processing of applications for services. A pre-application process will be utilized to determine available assistance for each applicant. *This is an on-going activity.*
 - ☒ The PHA will provide for the development and maintenance of a waiting list of applicants in accordance with program regulations. *This is an on-going activity.*
 - ☒ On an ongoing basis, the PHA will provide for marketing and training in relation to program eligibility, preference requirements, regulations and policies.
 - ☒ The PHA will maintain data relative to housing stock and participants/occupants. *This is an on-going activity.*
 - ☒ The PHA will provide for the updating of applicant data as changes occur, and for the verification of the applicant data prior to admission. *This is an on-going activity.*
 - ☒ The PHA will contract with a professional to perform a job comparability study and review organizational structure, write new job descriptions. *This will be done as needed.*
 - ☒ The PHA will contract with a professional to review policies and procedures of the entire agency. *This will be done as needed.*
 - ☒ The PHA will seek professional assistance in preparing a Comprehensive Operations, Maintenance and Management Plan. *This will be done as needed.*
 - ☒ The PHA will seek professional assistance in preparing a physical needs assessment. *This will be done as needed.*
 - ☒ The PHA will provide for preparation of work specifications and drawings. *This will be done as needed.*

Progress Statement: *Regarding all Goals and Objectives in this Section, the PHA has achieved or is on target with all goals and objectives during the FYB 2004. The PHA plans to continue these activities on an on-going basis.*

Annual PHA Plan
PHA Fiscal Year 2005
[24 CFR Part 903.7]

i. Annual Plan Type:

Select which type of Annual Plan the PHA will submit.

☐ **Standard Plan**

Streamlined Plan:

- ☒ **High Performing PHA**
☐ **Small Agency (<250 Public Housing Units)**
☐ **Administering Section 8 Only**

☐ **Troubled Agency Plan**

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

Provide a brief overview of the information in the Annual Plan, including highlights of major initiatives and discretionary policies the PHA has included in the Annual Plan.

The Housing Authority of the City of Sherman has prepared this Annual PHA Plan in compliance with Section 511 of the Quality Housing and Work Responsibility Act of 1998 and the ensuing HUD requirements.

The purpose of the Annual Plan is to provide a framework for local accountability and an easily identifiable source by which public housing residents and other members of the public may locate basic PHA policies, rules and requirements related to the operations, programs and services of the agency.

The Mission Statement and the Goals and Objectives were based on information contained in our jurisdiction's Consolidated Plan and will assure that our residents will receive the best customer service.

Excellent customer service and fulfillment of the Mission Statement and Goals and Objectives are ensured by implementation of a series of policies that are on display with this Plan. The Admissions and Occupancy Policy is the primary policy on display. This important document covers the public housing tenant selection and assignment plan, outreach services, grievance procedures, etc.

The most important challenges to be met by the Housing Authority of the City of Sherman during FY 2005 will include:

- *Preserve and improve the public housing stock through the Capital Funds activities.*

- *Train staff and commissioners to fully understand and take advantage of opportunities in the new law and regulations to better serve our residents and the community; and*
- *Identify, develop and leverage services to enable low-income families to become self-sufficient.*

In closing, this Annual PHA Plan exemplifies the commitment of the Housing Authority of the City of Sherman to meet the housing needs of the full range of low income residents. The Housing Authority of the City of Sherman, in partnership with agencies from all levels of government, the business community, non-profit community groups, and residents will use this plan as a road map to reach the “higher quality of life” destination for the City of Sherman.

iii. Annual Plan Table of Contents

[24 CFR Part 903.7 9 (r)]

Provide a table of contents for the Annual Plan, including attachments, and a list of supporting documents available for public inspection.

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Attachments

Indicate which attachments are provided by selecting all that apply. Provide the attachment's name (A, B, etc.) in the space to the left of the name of the attachment. Note: If the attachment is provided as a **SEPARATE** file submission from the PHA Plans file, provide the file name in parentheses in the space to the right of the title.

Required Attachments:

- ☒ Admissions Policy for Deconcentration (*tx078a01*)
- ☒ FY 2005 Capital Fund Program Annual Statement (*tx078b01*)
- ☐ Most recent board-approved operating budget (Required Attachment for PHAs that are troubled or at risk of being designated troubled ONLY)
- ☒ Other (List below, providing each attachment name)
 - Deconcentration and Income Mixing (*tx078c01*)
 - Progress in meeting 5-Year Plan Goals (*tx078d01*)
 - Criteria for Substantial Deviations and Significant Amendments (*tx078e01*)

Optional Attachments:

- ☐ PHA Management Organizational Chart
- ☒ FY 2005 Capital Fund Program 5 Year Action Plan (*tx078f01*)
- ☐ Public Housing Drug Elimination Program (PHDEP) Plan
- ☐ Comments of Resident Advisory Board or Boards (must be attached if not included in PHA Plan text)
- ☒ Other (List below, providing each attachment name)
 - 2004 Performance and Evaluation Report (tx078g01)*
 - 2003 Performance and Evaluation Report (tx078h01)*
 - 2003 Performance and Evaluation Report (set-aside)(tx078i01)*
 - 2002 Performance and Evaluation Report (tx078j01)*

Supporting Documents Available for Review

Indicate which documents are available for public review by placing a mark in the "Applicable & On Display" column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's	5 Year and Annual Plans

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
	involvement.	
<i>X</i>	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI))) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs
<i>X</i>	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;
<i>X</i>	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP]	Annual Plan: Eligibility, Selection, and Admissions Policies
<i>N/A</i>	Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies
<i>X</i>	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 <i>Quality Housing and Work Responsibility Act Initial Guidance; Notice</i> and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies
<i>X</i>	Public housing rent determination policies, including the methodology for setting public housing flat rents <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
<i>X</i>	Schedule of flat rents offered at each public housing development <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Rent Determination
<i>N/A</i>	Section 8 rent determination (payment standard) policies <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination
<i>X</i>	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance
<i>X</i>	Public housing grievance procedures <input checked="" type="checkbox"/> check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures
<i>N/A</i>	Section 8 informal review and hearing procedures <input type="checkbox"/> check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures
<i>X</i>	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs

List of Supporting Documents Available for Review		
Applicable & On Display	Supporting Document	Applicable Plan Component
<i>X</i>	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs
<i>X</i>	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs
<i>X</i>	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs
<i>X</i>	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition
<i>X</i>	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing
<i>X</i>	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act	Annual Plan: Conversion of Public Housing
<i>X</i>	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership
<i>N/A</i>	Policies governing any Section 8 Homeownership program <input type="checkbox"/> check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership
<i>X</i>	Any cooperative agreement between the PHA and the TANF agency	Annual Plan: Community Service & Self-Sufficiency
<i>N/A</i>	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency
<i>N/A</i>	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency
<i>N/A</i>	The most recent Public Housing Drug Elimination Program (PHDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention
<i>X</i>	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit
<i>N/A</i>	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs
<i>N/A</i>	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)

1. Statement of Housing Needs

A. Housing Needs of Families in the Jurisdiction/s Served by the PHA

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

Housing Needs of Families in the Jurisdiction by Family Type							
Family Type	Overall	Afford- ability	Supply	Quality	Access- ibility	Size	Loca- tion
Income <= 30% of AMI	1061	5	5	5	5	5	5
Income >30% but <=50% of AMI	680	5	5	5	5	5	5
Income >50% but <80% of AMI	969	4	4	4	4	4	4
Elderly	30	4	4	4	4	4	4
Families with Disabilities	30	5	5	5	5	5	5
<i>Caucasian</i>	2191	5	5	5	5	5	5
<i>African American</i>	341	5	5	5	5	5	5
<i>Hispanic</i>	109	5	5	5	5	5	5
<i>Native American</i>	31	5	5	5	5	5	5
<i>Asian/Pacific Islander</i>	35	5	5	5	5	5	5
<i>Other</i>	2	5	5	5	5	5	5

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)

- ☒ Consolidated Plan of the Jurisdiction/s *City of Sherman*
Indicate year: 2000
- ☒ U.S. Census data: the Comprehensive Housing Affordability Strategy ("CHAS") dataset
- ☐ American Housing Survey data
Indicate year:
- ☐ Other housing market study
Indicate year:
- ☐ Other sources: (list and indicate year of information)

B. Housing Needs of Families on the Public Housing and Section 8 Tenant- Based Assistance Waiting Lists

State the housing needs of the families on the PHA's waiting list/s. **Complete one table for each type of PHA-wide waiting list administered by the PHA.** PHAs may provide separate tables for site-based or sub-jurisdictional public housing waiting lists at their option.

<i>Housing Needs of Families on the Waiting List</i>			
Waiting list type: (select one)			
<input type="checkbox"/> Section 8 tenant-based assistance			
<input checked="" type="checkbox"/> Public Housing			
<input type="checkbox"/> Combined Section 8 and Public Housing			
<input type="checkbox"/> Public Housing Site-Based or sub-jurisdictional waiting list (optional)			
If used, identify which development/subjurisdiction:			
	# of families	% of total families	Annual Turnover
Waiting list total	40		119
Extremely low income <=30% AMI	37	93%	
Very low income (>30% but <=50% AMI)	3	7%	
Low income (>50% but <80% AMI)	0	0	
Families with children	27	68%	
Elderly families	0	0	
Families with Disabilities	2	5%	
Single Families	11	27%	
Race/White	25	63%	
Race/Black	8	20%	
Race/Hispanic	7	17%	
Characteristics by Bedroom Size (Public Housing Only)			
1BR	13	32.5%	57
2 BR	13	32.5%	33
3 BR	12	30%	24
4 BR	2	5%	5

<i>Housing Needs of Families on the Waiting List</i>			
5 BR	N/A	N/A	
5+ BR	N/A	N/A	
Is the waiting list closed (select one)? <input checked="" type="checkbox"/> No <input type="checkbox"/> Yes If yes: How long has it been closed (# of months)? Does the PHA expect to reopen the list in the PHA Plan year? <input type="checkbox"/> No <input type="checkbox"/> Yes Does the PHA permit specific categories of families onto the waiting list, even if generally closed? <input type="checkbox"/> No <input type="checkbox"/> Yes			

C. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

Strategy 1. Maximize the number of affordable units available to the PHA within its current resources by:

Select all that apply

- ☒ Employ effective maintenance and management policies to minimize the number of public housing units off-line
- ☒ Reduce turnover time for vacated public housing units
- ☒ Reduce time to renovate public housing units
- ☐ Seek replacement of public housing units lost to the inventory through mixed finance development
- ☐ Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
- ☐ Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
- ☒ Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
- ☐ Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
- ☐ Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
- ☒ Participate in the Consolidated Plan development process to ensure coordination with broader community strategies
- ☐ Other (list below)

Strategy 2: Increase the number of affordable housing units by:

Select all that apply

- ☐ Apply for additional section 8 units should they become available
- ☒ Leverage affordable housing resources in the community through the creation of mixed - finance housing
- ☒ Pursue housing resources other than public housing or Section 8 tenant-based assistance.
- ☐ Other: (list below)

Need: Specific Family Types: Families at or below 30% of median

Strategy 1: Target available assistance to families at or below 30 % of AMI

Select all that apply

- ☒ Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing
- ☐ Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based section 8 assistance
- ☐ Employ admissions preferences aimed at families with economic hardships
- ☒ Adopt rent policies to support and encourage work
- ☐ Other: (list below)

Need: Specific Family Types: Families at or below 50% of median

Strategy 1: Target available assistance to families at or below 50% of AMI

Select all that apply

- ☒ Employ admissions preferences aimed at families who are working
- ☒ Adopt rent policies to support and encourage work
- ☐ Other: (list below)

Need: Specific Family Types: The Elderly

Strategy 1: Target available assistance to the elderly:

Select all that apply

- ☐ Seek designation of public housing for the elderly
- ☒ Apply for special-purpose vouchers targeted to the elderly, should they become available
- ☐ Other: (list below)

Need: Specific Family Types: Families with Disabilities

Strategy 1: Target available assistance to Families with Disabilities:

Select all that apply

- ☐ Seek designation of public housing for families with disabilities
- ☐ Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing
- ☒ Apply for special-purpose vouchers targeted to families with disabilities, should they become available
- ☒ Affirmatively market to local non-profit agencies that assist families with disabilities
- ☐ Other: (list below)

Need: Specific Family Types: Races or ethnicities with disproportionate housing needs

Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs:

Select if applicable

- ☒ Affirmatively market to races/ethnicities shown to have disproportionate housing needs
- ☐ Other: (list below)

Strategy 2: Conduct activities to affirmatively further fair housing

Select all that apply

- ☐ Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units
- ☐ Market the section 8 program to owners outside of areas of poverty /minority concentrations
- ☐ Other: (list below)

Other Housing Needs & Strategies: (list needs and strategies below)

(2) Reasons for Selecting Strategies

Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue:

- ☒ Funding constraints
- ☐ Staffing constraints
- ☒ Limited availability of sites for assisted housing
- ☒ Extent to which particular housing needs are met by other organizations in the community

- ☒ Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA
- ☐ Influence of the housing market on PHA programs
- ☒ Community priorities regarding housing assistance
- ☒ Results of consultation with local or state government
- ☒ Results of consultation with residents and the Resident Advisory Board
- ☒ Results of consultation with advocacy groups
- ☐ Other: (list below)

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan year. Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

Financial Resources: Planned Sources and Uses		
Sources	Planned \$	Planned Uses
1. Federal Grants (FY 2005 grants)		
a) Public Housing Operating Fund	407,006	
b) Public Housing Capital Fund	453,032	
c) HOPE VI Revitalization		
d) HOPE VI Demolition		
e) Annual Contributions for Section 8 Tenant-Based Assistance		
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)		
g) Resident Opportunity and Self-Sufficiency Grants		
h) Community Development Block Grant	10,000	Public housing safety and security
i) HOME		
Other Federal Grants (list below)		
2. Prior Year Federal Grants (unobligated funds only) (list below)		Public housing capital improvements
2003 Capital funds	153,676	
2004 Capital Funds	374,797	
3. Public Housing Dwelling Rental Income	565,950	Public housing operations
4. Other income (list below)		
Interest on investments	5,840	
Legal fees, maintenance, tenant charges, late fees, NSF charges, etc.	31,070	
Excess utilities	44,440	
4. Non-federal sources (list below)		
Total resources	2,045,811	

3. PHA Policies Governing Eligibility, Selection, and Admissions

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete subcomponent 3A.

(1) Eligibility

- a. When does the PHA verify eligibility for admission to public housing? (select all that apply)
- ☐ When families are within a certain number of being offered a unit: (state number)
 - ☐ When families are within a certain time of being offered a unit: (state time)
 - ☒ Other: (describe)
 - *At time application is submitted*
- b. Which non-income (screening) factors does the PHA use to establish eligibility for admission to public housing (select all that apply)?
- ☒ Criminal or Drug-related activity
 - ☒ Rental history
 - ☒ Housekeeping
 - ☒ Other (describe)
 - *Sex-offender, citizenship/legal status check*
- c. ☒ Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
- d. ☐ Yes ☒ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?
- e. ☐ Yes ☒ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

(2)Waiting List Organization

- a. Which methods does the PHA plan to use to organize its public housing waiting list (select all that apply)
- ☒ Community-wide list
 - ☐ Sub-jurisdictional lists
 - ☐ Site-based waiting lists
 - ☐ Other (describe)
- b. Where may interested persons apply for admission to public housing?
- ☒ PHA main administrative office
 - ☐ PHA development site management office
 - ☐ Other (list below)

- c. If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection **(3) Assignment**

N/A – The PHA does not plan to operate a site based waiting list

1. How many site-based waiting lists will the PHA operate in the coming year? *N/A*

2. ☐ Yes ☐ No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)? *N/A*
If yes, how many lists?

3. ☐ Yes ☐ No: May families be on more than one list simultaneously? *N/A*
If yes, how many lists?

4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)? *N/A*

- ☐ PHA main administrative office
☐ All PHA development management offices
☐ Management offices at developments with site-based waiting lists
☐ At the development to which they would like to apply
☐ Other (list below)

(3) Assignment

- a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one)

- ☒ One
☐ Two
☐ Three or More

- b. ☒ Yes ☐ No: Is this policy consistent across all waiting list types?

- c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA: *N/A*

(4) Admissions Preferences

- a. Income targeting:

- ☒ Yes ☐ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?

b. Transfer policies:

In what circumstances will transfers take precedence over new admissions? (list below)

- ☒ Emergencies
- ☒ Overhoused
- ☒ Underhoused
- ☒ Medical justification
- ☒ Administrative reasons determined by the PHA (e.g., to permit modernization work)
- ☐ Resident choice: (state circumstances below)
- ☒ Other: (list below)
 - *Correct defects hazardous to health, life and safety*

c. Preferences

1. ☒ Yes ☐ No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If “no” is selected, skip to subsection **(5) Occupancy**)
2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences: *N/A*

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing
- ☐ Homelessness
- ☐ High rent burden (rent is > 50 percent of income)

Other preferences: (select below)

- ☒ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☐ Residents who live and/or work in the jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

3. If the PHA will employ admissions preferences, please prioritize by placing a “1” in the space that represents your first priority, a “2” in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use “1” more than once, “2” more than once, etc.

2 Date and Time

Former Federal preferences: *N/A*

Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
Victims of domestic violence
Substandard housing
Homelessness
High rent burden

Other preferences (select all that apply)

- ☒ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans’ families
- ☐ Residents who live and/or work in the jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

4. Relationship of preferences to income targeting requirements:

- ☐ The PHA applies preferences within income tiers
- ☒ Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

(5) Occupancy

a. What reference materials can applicants and residents use to obtain information about the rules of occupancy of public housing (select all that apply)

- ☒ The PHA-resident lease
- ☒ The PHA’s Admissions and (Continued) Occupancy policy
- ☒ PHA briefing seminars or written materials
- ☒ Other source (list)
 - *Video*

b. How often must residents notify the PHA of changes in family composition?
(select all that apply)

- ☐ At an annual reexamination and lease renewal
- ☒ Any time family composition changes
- ☐ At family request for revision
- ☒ Other (list)
 - Within 10 days of occurrence

(6) Deconcentration and Income Mixing tx078c01

a. ☒ Yes ☐ No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?

b. ☐ Yes ☒ No: Did the PHA adopt any changes to its **admissions policies** based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?

c. If the answer to b was yes, what changes were adopted? (select all that apply) *N/A*

☐ Adoption of site based waiting lists
If selected, list targeted developments below:

☐ Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments
If selected, list targeted developments below:

☐ Employing new admission preferences at targeted developments
If selected, list targeted developments below:

☐ Other (list policies and developments targeted below)

d. ☐ Yes ☐ No: Did the PHA adopt any changes to **other** policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?

e. If the answer to d was yes, how would you describe these changes? (select all that apply) *N/A*

- ☐ Additional affirmative marketing
- ☐ Actions to improve the marketability of certain developments
- ☐ Adoption or adjustment of ceiling rents for certain developments

- ☐ Adoption of rent incentives to encourage deconcentration of poverty and income-mixing
- ☐ Other (list below)

f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher-income families? (select all that apply)

- ☐ Not applicable: results of analysis did not indicate a need for such efforts
- ☐ List (any applicable) developments below:

g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply)

- ☐ Not applicable: results of analysis did not indicate a need for such efforts
- ☐ List (any applicable) developments below:

B. Section 8

Not applicable – The PHA does not administer Section 8

Exemptions: PHAs that do not administer section 8 are not required to complete sub-component 3B. Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).

(1) Eligibility N/A

a. What is the extent of screening conducted by the PHA? (select all that apply)

- ☐ Criminal or drug-related activity only to the extent required by law or regulation
- ☐ Criminal and drug-related activity, more extensively than required by law or regulation
- ☐ More general screening than criminal and drug-related activity (list factors below)
- ☐ Other (list below)

b. ☐ Yes ☐ No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?

c. ☐ Yes ☐ No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

d. ☐ Yes ☐ No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)

e. Indicate what kinds of information you share with prospective landlords? (select all that apply)

- ☐ Criminal or drug-related activity
- ☐ Other (describe below)

(2) Waiting List Organization N/A

a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply)

- ☐ None
- ☐ Federal public housing
- ☐ Federal moderate rehabilitation
- ☐ Federal project-based certificate program
- ☐ Other federal or local program (list below)

b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply)

- ☐ PHA main administrative office
- ☐ Other (list below)

(3) Search Time N/A

a. ☐ Yes ☐ No: Does the PHA give extensions on standard 60-day period to search for a unit?

If yes, state circumstances below:

(4) Admissions Preferences N/A

a. Income targeting

- ☐ Yes ☐ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income?

b. Preferences

1. ☐ Yes ☐ No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of application) (if no, skip to subcomponent **(5) Special purpose section 8 assistance programs**)

2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)

Former Federal preferences

- ☐ Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
- ☐ Victims of domestic violence
- ☐ Substandard housing

- ☐ Homelessness
- ☐ High rent burden (rent is > 50 percent of income)

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☐ Residents who live and/or work in your jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.

Date and Time

Former Federal preferences

Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition)
 Victims of domestic violence
 Substandard housing
 Homelessness
 High rent burden

Other preferences (select all that apply)

- ☐ Working families and those unable to work because of age or disability
- ☐ Veterans and veterans' families
- ☐ Residents who live and/or work in your jurisdiction
- ☐ Those enrolled currently in educational, training, or upward mobility programs
- ☐ Households that contribute to meeting income goals (broad range of incomes)
- ☐ Households that contribute to meeting income requirements (targeting)
- ☐ Those previously enrolled in educational, training, or upward mobility programs
- ☐ Victims of reprisals or hate crimes
- ☐ Other preference(s) (list below)

4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one)
- ☐ Date and time of application
- ☐ Drawing (lottery) or other random choice technique
5. If the PHA plans to employ preferences for “residents who live and/or work in the jurisdiction” (select one)
- ☐ This preference has previously been reviewed and approved by HUD
- ☐ The PHA requests approval for this preference through this PHA Plan
6. Relationship of preferences to income targeting requirements: (select one)
- ☐ The PHA applies preferences within income tiers
- ☐ Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements

(5) Special Purpose Section 8 Assistance Programs N/A

- a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose section 8 program administered by the PHA contained? (select all that apply)
- ☐ The Section 8 Administrative Plan
- ☐ Briefing sessions and written materials
- ☐ Other (list below)
- b. How does the PHA announce the availability of any special-purpose section 8 programs to the public?
- ☐ Through published notices
- ☐ Other (list below)

4. PHA Rent Determination Policies

[24 CFR Part 903.7 9 (d)]

A. Public Housing

Exemptions: PHAs that do not administer public housing are not required to complete sub-component 4A.

(1) Income Based Rent Policies

Describe the PHA's income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income disregards and exclusions, in the appropriate spaces below.

a. Use of discretionary policies: (select one)

- ☐ The PHA will not employ any discretionary rent-setting policies for income based rent in public housing. Income-based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub-component (2))

---or---

- ☒ The PHA employs discretionary policies for determining income based rent (If selected, continue to question b.)

b. inimum Rent

1. What amount best reflects the PHA's minimum rent? (select one)

- ☐ \$0
☒ \$1-\$25
☐ \$26-\$50

2. ☐ Yes ☒ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?

3. If yes to question 2, list these policies below: **N/A**

c. Rents set at less than 30% than adjusted income

1. ☐ Yes ☒ No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?

2. If yes to above, list the amounts or percentages charged and the circumstances under which these will be used below: **N/A**

d. Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply)

- ☒ For the earned income of a previously unemployed household member
- ☐ For increases in earned income
- ☐ Fixed amount (other than general rent-setting policy)
If yes, state amount/s and circumstances below:
- ☐ Fixed percentage (other than general rent-setting policy)
If yes, state percentage/s and circumstances below:
- ☐ For household heads
- ☐ For other family members
- ☐ For transportation expenses
- ☐ For the non-reimbursed medical expenses of non-disabled or non-elderly families
- ☐ Other (describe below)

e. Ceiling rents

1. Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)

- ☐ Yes for all developments
- ☐ Yes but only for some developments
- ☒ No

2. For which kinds of developments are ceiling rents in place? (select all that apply)
N/A

- ☐ For all developments
- ☐ For all general occupancy developments (not elderly or disabled or elderly only)
- ☐ For specified general occupancy developments
- ☐ For certain parts of developments; e.g., the high-rise portion
- ☐ For certain size units; e.g., larger bedroom sizes
- ☐ Other (list below)

3. Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply) N/A

- ☐ Market comparability study
- ☐ Fair market rents (FMR)
- ☐ 95th percentile rents
- ☐ 75 percent of operating costs
- ☐ 100 percent of operating costs for general occupancy (family) developments
- ☐ Operating costs plus debt service
- ☐ The "rental value" of the unit

☐ Other (list below)

f. Rent re-determinations:

1. Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply)

- ☐ Never
☐ Atfamily option
☐ Any time the family experiences an income increase
☐ Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold)_____
☒ Other (list below)
▪ *Tenants must report changes within 10 days of occurrence. After verification, PHA will determine if rent will be adjusted.*

g. ☐ Yes ☒ No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year?

(2) Flat Rents

1. In setting the market-based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.)

- ☒ The section 8 rent reasonableness study of comparable housing
☐ Survey of rents listed in local newspaper
☐ Survey of similar unassisted units in the neighborhood
☐ Other (list/describe below)

B. Section 8 Tenant-Based Assistance *PHA does not administer Section 8*

Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete sub-component 4B. **Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).**

(1) Payment Standards N/A

Describe the voucher payment standards and policies.

a. What is the PHA's payment standard? (select the category that best describes your standard)

- ☐ At or above 90% but below100% of FMR
☐ 100% of FMR
☐ Above 100% but at or below 110% of FMR

☐ Above 110% of FMR (if HUD approved; describe circumstances below)

b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply) *N/A*

- ☐ FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
- ☐ The PHA has chosen to serve additional families by lowering the payment standard
- ☐ Reflects market or submarket
- ☐ Other (list below)

c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply) *N/A*

- ☐ FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
- ☐ Reflects market or submarket
- ☐ To increase housing options for families
- ☐ Other (list below)

d. How often are payment standards reevaluated for adequacy? (select one) *N/A*

- ☐ Annually
- ☐ Other (list below)

e. What factors will the PHA consider in its assessment of the adequacy of its payment standard? (select all that apply) *N/A*

- ☐ Success rates of assisted families
- ☐ Rent burdens of assisted families
- ☐ Other (list below)

(2) Minimum Rent *N/A*

a. What amount best reflects the PHA's minimum rent? (select one)

- ☐ \$0
- ☐ \$1-\$25
- ☐ \$26-\$50

b. ☐ Yes ☐ No: Has the PHA adopted any discretionary minimum rent hardship exemption policies? (if yes, list below)

5. Operations and Management *This section is not required – PHA is High Performer*

[24 CFR Part 903.7 9 (e)]

Exemptions from Component 5: High performing and small PHAs are not required to complete this section. Section 8 only PHAs must complete parts A, B, and C(2)

A. PHA Management Structure *N/A*

Describe the PHA's management structure and organization.

(select one)

- ☐ An organization chart showing the PHA's management structure and organization is attached.
- ☐ A brief description of the management structure and organization of the PHA follows:

B. HUD Programs Under PHA Management *N/A*

List Federal programs administered by the PHA, number of families served at the beginning of the upcoming fiscal year, and expected turnover in each. (Use "NA" to indicate that the PHA does not operate any of the programs listed below.)

Program Name	Units or Families Served at Year Beginning	Expected Turnover
Public Housing		
Section 8 Vouchers		
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section 8 Certificates/Vouchers (list individually)		
Public Housing Drug Elimination Program (PHDEP)		
Other Federal Programs(list individually)		

C. Management and Maintenance Policies *N/A*

List the PHA's public housing management and maintenance policy documents, manuals and handbooks that contain the Agency's rules, standards, and policies that govern maintenance and management of public housing, including a description of any measures necessary for the prevention or eradication of pest infestation (which includes cockroach infestation) and the policies governing Section 8 management.

- (1) Public Housing Maintenance and Management: (list below)
- (2) Section 8 Management: (list below)

6. PHA Grievance Procedures

Not Applicable - High Performer

[24 CFR Part 903.7 9 (f)]

Exemptions from component 6: High performing PHAs are not required to complete component 6. Section 8-Only PHAs are exempt from sub-component 6A.

A. Public Housing N/A

1. ☐ Yes ☐ No: Has the PHA established any written grievance procedures in addition to federal requirements found at 24 CFR Part 966, Subpart B, for residents of public housing?

If yes, list additions to federal requirements below:

2. Which PHA office should residents or applicants to public housing contact to initiate the PHA grievance process? (select all that apply)

- ☐ PHA main administrative office
☐ PHA development management offices
☐ Other (list below)

B. Section 8 Tenant-Based Assistance N/A

1. ☐ Yes ☐ No: Has the PHA established informal review procedures for applicants to the Section 8 tenant-based assistance program and informal hearing procedures for families assisted by the Section 8 tenant-based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply)

- ☐ PHA main administrative office
☐ Other (list below)

7. Capital Improvement Needs

[24 CFR Part 903.7 9 (g)]

Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and may skip to Component 8.

A. Capital Fund Activities

Exemptions from sub-component 7A: PHAs that will not participate in the Capital Fund Program may skip to component 7B. All other PHAs must complete 7A as instructed.

(1) Capital Fund Program Annual Statement

Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long-term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template **OR**, at the PHA's option, by completing and attaching a properly updated HUD-52837.

Select one:

- ☒ The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) **tx078b01**

-or-

- ☐ The Capital Fund Program Annual Statement is provided below: (if selected, copy the CFP Annual Statement from the Table Library and insert here)

(2) Optional 5-Year Action Plan

Agencies are encouraged to include a 5-Year Action Plan covering capital work items. This statement can be completed by using the 5 Year Action Plan table provided in the table library at the end of the PHA Plan template **OR** by completing and attaching a properly updated HUD-52834.

- a. ☒ Yes ☐ No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)

b. If yes to question a, select one:

- ☒ The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment Texas **tx078f01**.

-or-

- ☐ The Capital Fund Program 5-Year Action Plan is provided below: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert here)

B. HOPE VI and Public Housing Development and Replacement Activities (Non-Capital Fund)

Applicability of sub-component 7B: All PHAs administering public housing. Identify any approved HOPE VI and/or public housing development or replacement activities not described in the Capital Fund Program Annual Statement.

- ☐ Yes ☒ No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary)
b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)

1. Development name: *N/A*
2. Development (project) number:
3. Status of grant: (select the statement that best describes the current status)

- ☐ Revitalization Plan under development
☐ Revitalization Plan submitted, pending approval
☐ Revitalization Plan approved
☐ Activities pursuant to an approved Revitalization Plan underway

- ☐ Yes ☒ No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year?
If yes, list development name/s below:

- ☐ Yes ☒ No: d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year?
If yes, list developments or activities below:

- ☐ Yes ☒ No: e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement?
If yes, list developments or activities below:

8. Demolition and Disposition

[24 CFR Part 903.7 9 (h)]

Applicability of component 8: Section 8 only PHAs are not required to complete this section.

1. ☐ Yes ☒ No: Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If “No”, skip to component 9; if “yes”, complete one activity description for each development.)

2. Activity Description *N/A*

- ☐ Yes ☐ No: Has the PHA provided the activities description information in the **optional** Public Housing Asset Management Table? (If “yes”, skip to component 9. If “No”, complete the Activity Description table below.)

Demolition/Disposition Activity Description
1a. Development name:
1b. Development (project) number:
2. Activity type: Demolition <input type="checkbox"/> Disposition <input type="checkbox"/>
3. Application status (select one) Approved <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date application approved, submitted, or planned for submission: <u>(DD/MM/YY)</u>
5. Number of units affected:
6. Coverage of action (select one) <input type="checkbox"/> Part of the development <input type="checkbox"/> Total development
7. Timeline for activity: a. Actual or projected start date of activity: b. Projected end date of activity:

Designation of Public Housing for Occupancy by Elderly Families or Families with Disabilities or Elderly Families and Families with Disabilities *Not Applicable High Performer*

[24 CFR Part 903.7 9 (i)]

Exemptions from Component 9; Section 8 only PHAs are not required to complete this section.

1. ☐ Yes ☒ No: Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If “No”, skip to component 10. If “yes”, complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHAs completing streamlined submissions may skip to component 10.)

2. Activity Description *N/A*

- ☐ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If “yes”, skip to component 10. If “No”, complete the Activity Description table below.

Designation of Public Housing Activity Description
1a. Development name:
1b. Development (project) number:
2. Designation type: Occupancy by only the elderly <input type="checkbox"/> Occupancy by families with disabilities <input type="checkbox"/> Occupancy by only elderly families and families with disabilities <input type="checkbox"/>
3. Application status (select one) Approved; included in the PHA’s Designation Plan <input type="checkbox"/> Submitted, pending approval <input type="checkbox"/> Planned application <input type="checkbox"/>
4. Date this designation approved, submitted, or planned for submission: (DD/MM/YY)
5. If approved, will this designation constitute a (select one) <input type="checkbox"/> New Designation Plan <input type="checkbox"/> Revision of a previously-approved Designation Plan?
6. Number of units affected:
7. Coverage of action (select one) <input type="checkbox"/> Part of the development

☐ Total development

10. Conversion of Public Housing to Tenant-Based Assistance

Not Applicable High Performer

[24 CFR Part 903.7 9 (j)]

Exemptions from Component 10; Section 8 only PHAs are not required to complete this section.

A. Assessments of Reasonable Revitalization Pursuant to section 202 of the HUD FY 1996 HUD Appropriations Act

1. ☐ Yes ☒ No: Have any of the PHA's developments or portions of developments been identified by HUD or the PHA as covered under section 202 of the HUD FY 1996 HUD Appropriations Act? (If "No", skip to component 11; if "yes", complete one activity description for each identified development, unless eligible to complete a streamlined submission. PHAs completing streamlined submissions may skip to component 11.)

2. Activity Description *N/A*

☐ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing Asset Management Table? If "yes", skip to component 11. If "No", complete the Activity Description table below.

Conversion of Public Housing Activity Description
1a. Development name:
1b. Development (project) number:
2. What is the status of the required assessment? <input type="checkbox"/> Assessment underway <input type="checkbox"/> Assessment results submitted to HUD <input type="checkbox"/> Assessment results approved by HUD (if marked, proceed to next question) <input type="checkbox"/> Other (explain below)
3. <input type="checkbox"/> Yes <input type="checkbox"/> No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to block 5.)
4. Status of Conversion Plan (select the statement that best describes the current status) <input type="checkbox"/> Conversion Plan in development <input type="checkbox"/> Conversion Plan submitted to HUD on: (DD/MM/YYYY) <input type="checkbox"/> Conversion Plan approved by HUD on: (DD/MM/YYYY) <input type="checkbox"/> Activities pursuant to HUD-approved Conversion Plan underway
5. Description of how requirements of Section 202 are being satisfied by means other

than conversion (select one)

- ☐ Units addressed in a pending or approved demolition application (date submitted or approved: _____)
- ☐ Units addressed in a pending or approved HOPE VI demolition application (date submitted or approved: _____)
- ☐ Units addressed in a pending or approved HOPE VI Revitalization Plan (date submitted or approved: _____)
- ☐ Requirements no longer applicable: vacancy rates are less than 10 percent
- ☐ Requirements no longer applicable: site now has less than 300 units
- ☐ Other: (describe below)

B. Reserved for Conversions pursuant to Section 22 of the U.S. Housing Act of 1937

C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937

11. Homeownership Programs Administered by the PHA *Not Applicable High Performer*

[24 CFR Part 903.7 9 (k)]

A. Public Housing

Exemptions from Component 11A: Section 8 only PHAs are not required to complete 11A.

1. ☐ Yes ☒ No: Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If “No”, skip to component 11B; if “yes”, complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to **small PHA** or **high performing PHA** status. PHAs completing streamlined submissions may skip to component 11B.)

2. Activity Description *N/A*

- ☐ Yes ☐ No: Has the PHA provided all required activity description information for this component in the **optional** Public Housing

Asset Management Table? (If “yes”, skip to component 12. If “No”, complete the Activity Description table below.)

Public Housing Homeownership Activity Description (Complete one for each development affected)	
1a. Development name:	
1b. Development (project) number:	
2. Federal Program authority:	
<input type="checkbox"/>	HOPE I
<input type="checkbox"/>	5(h)
<input type="checkbox"/>	Turnkey III
<input type="checkbox"/>	Section 32 of the USHA of 1937 (effective 10/1/99)
3. Application status: (select one)	
<input type="checkbox"/>	Approved; included in the PHA's Homeownership Plan/Program
<input type="checkbox"/>	Submitted, pending approval
<input type="checkbox"/>	Planned application
4. Date Homeownership Plan/Program approved, submitted, or planned for submission: (DD/MM/YYYY)	
5. Number of units affected:	
6. Coverage of action: (select one)	
<input type="checkbox"/>	Part of the development
<input type="checkbox"/>	Total development

B. Section 8 Tenant Based Assistance

This PHA does not administer Section 8

1. ☐ Yes ☐ No: Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982 ? (If "No", skip to component 12; if "yes", describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. **High performing PHAs** may skip to component 12.) *N/A*

2. Program Description: *N/A*

a. Size of Program

- ☐ Yes ☐ No: Will the PHA limit the number of families participating in the section 8 homeownership option?

If the answer to the question above was yes, which statement best describes the number of participants? (select one)

- ☐ 25 or fewer participants
☐ 26 - 50 participants

- ☐ 51 to 100 participants
☐ more than 100 participants

b. PHA-established eligibility criteria

- ☐ Yes ☐ No: Will the PHA's program have eligibility criteria for participation in its Section 8 Homeownership Option program in addition to HUD criteria?

If yes, list criteria below:

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (l)] ***This section is not required – PHA is High Performer***

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8-Only PHAs are not required to complete sub-component C.

A. PHA Coordination with the Welfare (TANF) Agency *N/A*

1. Cooperative agreements:

- ☐ Yes ☐ No: Has the PHA entered into a cooperative agreement with the TANF Agency, to share information and/or target supportive services (as contemplated by section 12(d)(7) of the Housing Act of 1937)?

If yes, what was the date that agreement was signed? DD/MM/YY

2. Other coordination efforts between the PHA and TANF agency (select all that apply)

- ☐ Client referrals
☐ Information sharing regarding mutual clients (for rent determinations and otherwise)
☐ Coordinate the provision of specific social and self-sufficiency services and programs to eligible families
☐ Jointly administer programs
☐ Partner to administer a HUD Welfare-to-Work voucher program
☐ Joint administration of other demonstration program
☐ Other (describe)

B. Services and programs offered to residents and participants *N/A*

(1) General

a. Self-Sufficiency Policies

Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self-sufficiency of assisted families in the following areas? (select all that apply)

- ☐ Public housing rent determination policies
☐ Public housing admissions policies
☐ Section 8 admissions policies

- ☐ Preference in admission to section 8 for certain public housing families
- ☐ Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA
- ☐ Preference/eligibility for public housing homeownership option participation
- ☐ Preference/eligibility for section 8 homeownership option participation
- ☐ Other policies (list below)

b. Economic and Social self-sufficiency programs

- ☐ Yes ☐ No: Does the PHA coordinate, promote or provide any programs to enhance the economic and social self-sufficiency of residents? (If “yes”, complete the following table; if “no” skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use.)

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)

(2) Family Self Sufficiency program/s N/A

a. Participation Description

Family Self Sufficiency (FSS) Participation		
Program	Required Number of Participants (start of FY 2005 Estimate)	Actual Number of Participants (As of: DD/MM/YY)
Public Housing		
Section 8		

- b. ☐ Yes ☐ No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address the steps the PHA plans to take to achieve at least the minimum program size?
If no, list steps the PHA will take below:

C. Welfare Benefit Reductions N/A

1. The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply)
- ☐ Adopting appropriate changes to the PHA's public housing rent determination policies and train staff to carry out those policies
 - ☐ Informing residents of new policy on admission and reexamination
 - ☐ Actively notifying residents of new policy at times in addition to admission and reexamination.
 - ☐ Establishing or pursuing a cooperative agreement with all appropriate TANF agencies regarding the exchange of information and coordination of services
 - ☐ Establishing a protocol for exchange of information with all appropriate TANF agencies
 - ☐ Other: (list below)

D. Reserved for Community Service Requirement pursuant to section 12(c) of the U.S. Housing Act of 1937

Not required – High Performer

13. PHA Safety and Crime Prevention Measures *Not Applicable- High Performer*

[24 CFR Part 903.7 9 (m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High Performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to sub-component D.

A. Need for measures to ensure the safety of public housing residents *N/A*

1. Describe the need for measures to ensure the safety of public housing residents (select all that apply)

- ☐ High incidence of violent and/or drug-related crime in some or all of the PHA's developments
- ☐ High incidence of violent and/or drug-related crime in the areas surrounding or adjacent to the PHA's developments
- ☐ Residents fearful for their safety and/or the safety of their children
- ☐ Observed lower-level crime, vandalism and/or graffiti
- ☐ People on waiting list unwilling to move into one or more developments due to perceived and/or actual levels of violent and/or drug-related crime
- ☐ Other (describe below)

2. What information or data did the PHA use to determine the need for PHA actions to improve safety of residents (select all that apply).

- ☐ Safety and security survey of residents
- ☐ Analysis of crime statistics over time for crimes committed "in and around" public housing authority
- ☐ Analysis of cost trends over time for repair of vandalism and removal of graffiti
- ☐ Resident reports
- ☐ PHA employee reports
- ☐ Police reports
- ☐ Demonstrable, quantifiable success with previous or ongoing anticrime/anti drug programs
- ☐ Other (describe below)

3. Which developments are most affected? (list below)

B. Crime and Drug Prevention activities the PHA has undertaken or plans to undertake in the next PHA fiscal year *N/A*

1. List the crime prevention activities the PHA has undertaken or plans to undertake: (select all that apply)

- ☐ Contracting with outside and/or resident organizations for the provision of crime- and/or drug-prevention activities
- ☐ Crime Prevention Through Environmental Design
- ☐ Activities targeted to at-risk youth, adults, or seniors
- ☐ Volunteer Resident Patrol/Block Watchers Program
- ☐ Other (describe below)

2. Which developments are most affected? (list below)

C. Coordination between PHA and the police *N/A*

1. Describe the coordination between the PHA and the appropriate police precincts for carrying out crime prevention measures and activities: (select all that apply)

- ☐ Police involvement in development, implementation, and/or ongoing evaluation of drug-elimination plan
- ☐ Police provide crime data to housing authority staff for analysis and action
- ☐ Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)
- ☐ Police regularly testify in and otherwise support eviction cases
- ☐ Police regularly meet with the PHA management and residents
- ☐ Agreement between PHA and local law enforcement agency for provision of above-baseline law enforcement services
- ☐ Other activities (list below)

2. Which developments are most affected? (list below)

D. Additional information as required by PHDEP/PHDEP Plan *Not Required*

PHAs eligible for FY 2000 PHDEP funds must provide a PHDEP Plan meeting specified requirements prior to receipt of PHDEP funds.

- ☐ Yes ☐ No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
- ☐ Yes ☐ No: Has the PHA included the PHDEP Plan for FY 2000 in this PHA Plan?
- ☐ Yes ☐ No: This PHDEP Plan is an Attachment. (Attachment Filename: ____)

14. RESERVED FOR PET POLICY

[24 CFR Part 903.7 9 (n)]

N/A High Performer

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

Civil rights certifications are included in the PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations.

16. Fiscal Audit

[24 CFR Part 903.7 9 (p)]

1. ☒ Yes ☐ No: Is the PHA required to have an audit conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U.S.C. 1437c(h))?
(If no, skip to component 17.)
2. ☒ Yes ☐ No: Was the most recent fiscal audit submitted to HUD?
3. ☐ Yes ☒ No: Were there any findings as the result of that audit?
4. ☐ Yes ☐ No: If there were any findings, do any remain unresolved?
If yes, how many unresolved findings remain? _____
5. ☐ Yes ☐ No: Have responses to any unresolved findings been submitted to HUD? *N/A*
If not, when are they due (state below)?

17. PHA Asset Management *This section not required – PHA is a High Performer*

[24 CFR Part 903.7 9 (q)]

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component. High performing and small PHAs are not required to complete this component.

1. ☐ Yes ☐ No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have **not** been addressed elsewhere in this PHA Plan?
2. What types of asset management activities will the PHA undertake? (select all that apply)
 - ☐ Not applicable
 - ☐ Private management
 - ☐ Development-based accounting
 - ☐ Comprehensive stock assessment
 - ☐ Other: (list below)
3. ☐ Yes ☐ No: Has the PHA included descriptions of asset management activities in the **optional** Public Housing Asset Management Table?

18. Other Information

[24 CFR Part 903.7 9 (r)]

A. Resident Advisory Board Recommendations

1. ☒ Yes ☐ No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s?
2. If yes, the comments are: (if comments were received, the PHA **MUST** select one)
☐ Attached at Attachment (File name)
☒ Provided below:
 - *Replace Flooring*
 - *Bus Shelters*
 - *Add kitchen shelves*
3. In what manner did the PHA address those comments? (select all that apply)
☐ Considered comments, but determined that no changes to the PHA Plan were necessary.
☐ The PHA changed portions of the PHA Plan in response to comments
List changes below:
☒ Other: (list below)
 - *Include replacement of tile floors on the five-year plan*
 - *Review addition of bus shelters in the five-year plan*
 - *Install additional kitchen cabinet shelves to be addressed through routine maintenance on an "as needed" basis.*

B. Description of Election process for Residents on the PHA Board

1. ☐ Yes ☒ No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.)
2. ☐ Yes ☒ No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to sub-component C.)

3. Description of Resident Election Process *N/A*

- a. Nomination of candidates for place on the ballot: (select all that apply) *N/A*
☐ Candidates were nominated by resident and assisted family organizations
☐ Candidates could be nominated by any adult recipient of PHA assistance
☐ Self-nomination: Candidates registered with the PHA and requested a place on ballot
☐ Other: (describe)

b. Eligible candidates: (select one) *N/A*

- ☐ Any recipient of PHA assistance
- ☐ Any head of household receiving PHA assistance
- ☐ Any adult recipient of PHA assistance
- ☐ Any adult member of a resident or assisted family organization
- ☐ Other (list)

c. Eligible voters: (select all that apply) *N/A*

- ☐ All adult recipients of PHA assistance (public housing and section 8 tenant-based assistance)
- ☐ Representatives of all PHA resident and assisted family organizations
- ☐ Other (list)

C. Statement of Consistency with the Consolidated Plan

For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).

1. Consolidated Plan jurisdiction: (provide name here) *City of Sherman*
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)
 - ☒ The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s.
 - ☒ The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan.
 - ☐ The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan.
 - ☐ Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below)
 - ☐ Other: (list below)
4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)
 - *To expand the supply of decent, safe and affordable housing.*
 - *To provide rental assistance to extremely low and low income households needing affordable housing by seeking and applying for additional funding from various federal/state/local resources.*
 - *To expand the supply of homeownership opportunities for low and moderate income families.*

D. Other Information Required by HUD

Use this section to provide any additional information requested by HUD.

Attachments

Use this section to provide any additional attachments referenced in the Plans.

PHA Plan Table Library

Component 7 Capital Fund Program Annual Statement Parts I, II, and II

Annual Statement Capital Fund Program (CFP) Part I: Summary

Capital Fund Grant Number FFY of Grant Approval: (MM/YYYY)

☐ Original Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	
3	1408 Management Improvements	
4	1410 Administration	
5	1411 Audit	
6	1415 Liquidated Damages	
7	1430 Fees and Costs	
8	1440 Site Acquisition	
9	1450 Site Improvement	
10	1460 Dwelling Structures	
11	1465.1 Dwelling Equipment-Nonexpendable	
12	1470 Nondwelling Structures	
13	1475 Nondwelling Equipment	
14	1485 Demolition	
15	1490 Replacement Reserve	
16	1492 Moving to Work Demonstration	
17	1495.1 Relocation Costs	
18	1498 Mod Used for Development	
19	1502 Contingency	
20	Amount of Annual Grant (Sum of lines 2-19)	
21	Amount of line 20 Related to LBP Activities	
22	Amount of line 20 Related to Section 504 Compliance	
23	Amount of line 20 Related to Security	
24	Amount of line 20 Related to Energy Conservation Measures	

Annual Statement
Capital Fund Program (CFP) Part II: Supporting Table

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total Estimated Cost

Annual Statement

Capital Fund Program (CFP) Part III: Implementation Schedule

Development Number/Name HA-Wide Activities	All Funds Obligated (Quarter Ending Date)	All Funds Expended (Quarter Ending Date)

Optional Table for 5-Year Action Plan for Capital Fund (Component 7)

Complete one table for each development in which work is planned in the next 5 PHA fiscal years. Complete a table for any PHA-wide physical or management improvements planned in the next 5 PHA fiscal year. Copy this table as many times as necessary. Note: PHAs need not include information from Year One of the 5-Year cycle, because this information is included in the Capital Fund Program Annual Statement.

Optional 5-Year Action Plan Tables				
Development Number	Development Name (or indicate PHA wide)	Number Vacant Units	% Vacancies in Development	
Description of Needed Physical Improvements or Management Improvements			Estimated Cost	Planned Start Date (HA Fiscal Year)
Total estimated cost over next 5 years				

Optional Public Housing Asset Management Table

N/A High Performer

See Technical Guidance for instructions on the use of this table, including information to be provided.

Public Housing Asset Management								
Development Identification		Activity Description						
Name, Number, and Location	Number and Type of units	Capital Fund Program Parts II and III <i>Component 7a</i>	Development Activities <i>Component 7b</i>	Demolition / disposition <i>Component 8</i>	Designated housing <i>Component 9</i>	Conversion <i>Component 10</i>	Home-ownership <i>Component 11a</i>	Other (describe) <i>Component 17</i>

Attachment: tx078a01

**DE-CONCENTRATION AND INCOME TARGETING POLICY
FOR THE
HOUSING AUTHORITY OF THE CITY OF
SHERMAN, TEXAS**

Adopted by Board of Commissioners

Resolution No.: 02-703

Date of Adoption: 11/27/02

DE-CONCENTRATION AND INCOME TARGETING POLICY

(of the Public Housing Admissions and Occupancy Policy)

Sub-Title A, Section 513 of the Quality Housing and Work Responsibility Act of 1998 (QHWRA), establishes two interrelated requirements for implementation by Public Housing Authorities: (1) Economic De-concentration of public housing developments and (2) Income Targeting to assure that families in the “extremely low” income category are proportionately represented in public housing and that pockets of poverty are reduced or eliminated. In order to implement these new requirements the PHA must promote these provisions as policies and revise their Admission and Occupancy policies and procedures to comply.

Therefore, the Housing Authority of the City of Sherman, Sherman, Texas (hereinafter referred to as PHA) hereby affirms its commitment to implementation of the two requirements by adopting the following policies:

A. Economic De-concentration:

Admission and Continued Occupancy Policies are revised to include the PHA’s policy of promoting economic de-concentration. Implementation of this program may require the PHA to determine the median income of residents in each development, determine the average income of residents in all developments, compute the Established Income Range (EIR), determine developments outside the EIR, and provide adequate explanations and/or policies as needed to promote economic de-concentration.

Implementation may include one or more of the following options:

- Skipping families on the waiting list based on income;
- Establishing preferences for working families;
- Establish preferences for families in job training programs;
- Establish preferences for families in education or training programs;
- Marketing campaign geared toward targeting income groups for specific developments;
- Additional supportive services;
- Additional amenities for all units;
- Flat rents for developments and unit sizes;
- Different tenant rent percentages per development;
- Different tenant rent percentages per bedroom size;
- Saturday and evening office hours;
- Security Deposit waivers;
- Revised transfer policies;
- Site-based waiting lists;
- Mass Media advertising/Public service announcements; and
- Giveaways.

B. Income Targeting

As public housing dwelling units become available for occupancy, responsible PHA employees will offer units to applicants on the waiting list. In accordance with the Quality Housing and Work Responsibility Act of 1998, the PHA encourages occupancy of its developments by a broad range of families with incomes up to eighty percent (80%) of the median income for the jurisdiction in which the PHA operates. Depending on the availability of applicants with proper demographics, at a minimum, 40% of all new admissions to public housing **on an annual basis** may be families with incomes at or below thirty percent (30%)(extremely low-income) of the area median income. The offer of assistance will be made without discrimination because of race, color, religion, sex, national origin, age, handicap or familial status.

In order to implement the income targeting program, the following policy is adopted:

- ▶ The PHA may select, based on date and time of application and preferences, two (2) families in the extremely low-income category and two (2) families from the lower/very low-income category alternately until the forty percent (40%) admission requirement of extremely low-income families is achieved (2 plus 2 policy).
- ▶ After the minimum level is reached, all selections may be made based solely on date, time and preferences. Any applicants passed over as a result of implementing this 2 plus 2 policy will retain their place on the waiting list and will be offered a unit in order of their placement on the waiting list.
- ▶ To the maximum extent possible, the offers will also be made to effect the PHA's policy of economic de-concentration.
- ▶ The PHA reserves the option, at any time, to reduce the targeting requirement for public housing by no more than ten percent (10%), if it increases the target figure for its Section 8 program from the required level of seventy five (75%) of annual new admissions to no more than eighty-five percent (85%) of its annual new admissions. (Optional for the PHAs with both Section 8 and Public Housing programs)

CAPITAL FUND PROGRAM TABLES START HERE

tx078b01

Annual Statement /Performance and Evaluation Report						11/16/2004
Capital Funds Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary						
PHA Name: Housing Authority of the City of Sherman			Grant Type and Number: Capital Fund Program No: TX21P078501-05 Replacement Housing Factor Grant No:		Federal FY of Grant: 2005	
<input checked="" type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserved for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement/Revision Number _____ <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending _____ <input type="checkbox"/> Final Performance and Evaluation Report for Program Year Ending _____						
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost		
		Original	Revised	Obligated	Expended	
1	Total Non-Capital Funds					
2	1406 Operating Expenses	67,955.00				
3	1408 Management Improvements	37,180.00				
4	1410 Administration	35,460.00				
5	1411 Audit					
6	1415 Liquidated Damages					
7	1430 Fees and Costs	32,500.00				
8	1440 Site Acquisition					
9	1450 Site Improvement	50,534.00				
10	1460 Dwelling Structures	193,230.00				
11	1465.1 Dwelling Equipment-Nonexpendable	19,173.00				
12	1470 Nondwelling Structures	2,000.00				
13	1475 Nondwelling Equipment	15,000.00				
14	1485 Demolition					
15	1490 Replacement Reserve					
16	1492 Moving to Work Demonstration					
17	1495.1 Relocation Costs					
18	1499 Development Activities					
19	1501 Collateralization or Debt Service					
20	1502 Contingency					
21	Amount of Annual Grant (sums of lines 2-20)	\$453,032.00				
22	Amount of line 21 Related to LBP Activities					
23	Amount of Line 21 Related to Section 504 Compliance					
24	Amount of Line 21 Related to Security - Soft Costs					
25	Amount of Line 21 Related to Security - Hard Costs					
26	Amount of Line 21 Related to Energy Conservation Measures					

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

11/16/2004

PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21P078501-05 Replacement Housing Factor Grant No:						Federal FY of Grant: 2005
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-Wide	Operating Expenses	1406		67,955.00				
	Total 1406			67,955.00				
HA-Wide	Management Improvements							
	Resident Initiatives Assistant	1408		17,110.00				
	Benefits	1408		7,310.00				
	Staff Training:							
	Occupancy & Lease Enforcement Training	1408		1,200.00				
	Board of Commissioners	1408		1,500.00				
	Maintenance Technical	1408		900.00				
	General Technical Assistance	1408		4,960.00				
	Update Automated Systems-Software	1408		2,000.00				
	Resident Training:							
	Self-Sufficiency Classes	1408		2,200.00				
	Total 1408			37,180.00				
HA-Wide	Administration							
	Clerk of the Works	1410		18,350.00				
	Prorated Salaries	1410		7,945.00				
	Benefits	1410		9,165.00				
	Total 1410			35,460.00				
HA-Wide	Fees and Costs							
	A/E Services	1430		24,450.00				
	Inspection Costs	1430		2,050.00				
	Printing Costs	1430		1,000.00				
	Consultant Fees Annual Plan	1430		5,000.00				
	Total 1430			32,500.00				

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

11/16/2004

PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21P078501-05 Replacement Housing Factor Grant No:						Federal FY of Grant: 2005
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-Wide	Site Improvement:							
	Landscaping	1450		7,500.00				
	Sidewalks	1450		43,034.00				
	Total 1450			50,534.00				
HA-Wide	Dwelling Structures:							
	Porches	1460		20,000.00				
Hoard Site	Dwelling Structures:							
TX078001H	Siding/Exterior Paint (Phase II of II)	1460		23,230.00				
Scott Circle Site	Dwelling Structures:							
TX078001SC	Siding/Exterior Paint	1460	78 units	85,000.00				
TX078001SS	Dwelling Structures:							
Scattered Sites	Siding/Exterior Paint	1460	102 units	65,000.00				
	Total 1460			193,230.00				
HA-Wide	Dwelling Equipment							
	Replace Ranges	1465	78 units	19,173.00				
	Total 1465			19,173.00				
HA-Wide	Non-Dwelling Structures:							
	Ext. Siding and Paint M/M Bldg. - Community Center	1470		2,000.00				
	Total 1470			2,000.00				
HA-Wide	Nondwelling Equipment							
	Computer Hardware Upgrades	1475		5,000.00				
	Office and Community Center Furniture	1475		5,000.00				
	Lawn Mower	1475	1	5,000.00				
	Total 1475			15,000.00				
	TOTAL ESTIMATED GRANT FOR 2005			\$453,032.00				

Annual Statement/Performance and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule		11/16/2004
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11/16/2004

[illegible]

Attachment: tx078c01
Sherman Housing Authority

Component 3, (6) Deconcentration and Income Mixing

- a. ☒ Yes ☐ No: Does the PHA have any general occupancy (family) public housing developments covered by the deconcentration rule? If no, this section is complete. If yes, continue to the next question.
- b. ☒ Yes ☐ No: Do any of these covered developments have average incomes above or below 85% to 115% of the average incomes of all such developments? If no, this section is complete.

If yes, list these developments as follows:

Deconcentration Policy for Covered Developments			
Development Name:	Number of Units	Explanation (if any) [see step 4 at §903.2(c)(1)(iv)]	Deconcentration policy (if no explanation) [see step 5 at §903.2(c)(1)(v)]
Pecan Site	2	C. The covered development's or development's size; location and/or configuration promote income deconcentration , such as scattered site or small developments	

Attachment: tx078d01
Housing Authority of the City of Sherman

Progress in Meeting 5-Year
Plan Goals (2000-2004)

The Housing Authority of the City of Sherman has been successful in achieving its mission and goals in the FY 2000-2004. Goals are either completed or on target for completion by the end of the year.

Concerning modernization, approximately \$346,127 was spent and \$555,891 was obligated during the past year. The Housing Authority has constructed a new laundry/storage building and expanded the parking lot at the Hoard site; installed ceiling fans at the scattered properties, and installed new weather stripping and thresholds at the Scott Circle site.

Concerning self-sufficiency and crime and safety, the Housing Authority's efforts have reduced crime in the communities through additional proactive police patrols and community involvement. Participation in the GED and ESL classes increased during the past year from two day-a-week to three day-a-week classes.

Concerning improving the quality of life, the Housing Authority has provided resident services and community building programs dealing with health issues, nutrition, parenting, job placement, job skills, reading programs, computer classes, tutoring, sports, and recreational events. Residents continue to meet on a bi-monthly meeting where they are informed on upcoming events and any new regulations that will affect them.

To ensure compliance with the Public Housing Reform Act of 1998, every policy was reviewed and updated as needed. Most significant was the update to the Admissions and Occupancy Policy.

Concerning ensuring equal opportunity, outreach efforts have been made by making renewed partnerships with community groups and medical facilities.

Attachment: tx078e01
Housing Authority of the City of Sherman

A. Substantial Deviation from the 5-Year Plan:

- Any change to the Mission Statement;
- 50% deletion from or addition to the goals and objectives as a whole; and
- 50% or more decrease in the quantifiable measurement of any individual goal or objective.

B. Significant Amendment or Modification to the Annual Plan:

- Any increase or decrease over 50% in the funds projected in the Financial Resource Statement and/or the Capital Fund Program Annual Statement;
- Any *change being submitted* to HUD that requires a separate notification to residents, such as *changes in the* Hope VI, Public Housing Conversion, Demolition/Disposition, Designated Housing or *Public Housing* Homeownership programs; and
- Any change *in policy or operation that is* inconsistent with the *applicable* Consolidated Plan.

Capital Funds Program Five Year Action Plan

Part II: Supporting Pages--Work Activities

11/16/2004

Activities for Year 1		Activities for Year: 2 FFY Grant: 2006 PHA FY: 2006		Activities for Year: 2 FFY Grant: 2006 PHA FY: 2006		
2005	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See		Funds for Operations	67,955.00	HA-Wide	Copier	5,000.00
		Total	67,955.00		Computer Hardware	2,000.00
		Management Improvements:			Playground Equipment	21,258.00
		Resident Initiatives Assistant	17,800.00		Refrigerators	6,000.00
		Benefits	7,360.00		Top Soil & Trees	10,629.00
Annual		Staff Training			Sidewalks and Porches	20,000.00
		Occupancy & Lease Enforcement Training	1,200.00		Subtotal	64,887.00
		Board of Commissioners	1,500.00		TOTAL HA-WIDE	238,722.00
		Maintenance Technical	900.00			
		General Technical Assistance	6,630.00	Hoard Site	Splash Blocks, Gutters & Downspouts	46,500.00
		Update Automated Systems-Software	2,000.00	TX078001H	Bathtubs and Faucets	75,670.00
Statement		Resident Training:			TOTAL HOARD SITE	122,170.00
		Self-Sufficiency Classes	2,200.00			
				TX078001SC		
		Total	39,590.00	Scott Circle	Splash Blocks, Gutters & Downspouts	27,900.00
					TOTAL SCOTT CIRCLE SITE	27,900.00
		Administration:				
		Clerk of the Works	19,270.00	TX078001SS	Splash Blocks, Gutters & Downspouts	45,780.00
		Prorated Salaries	4,470.00	Scattered Sites	Bathtubs and Faucets	18,460.00
		Benefits	10,100.00		SCATTERED SITES TOTAL	64,240.00
		Total	33,840.00			
		Fees and Costs:				
		A/E Services	24,450.00			
		Inspection Costs	2,000.00			
		Printing Costs	1,000.00			
		Consultant Fees Annual Plan	5,000.00			
		Total	32,450.00		TOTAL CFP ESTIMATED COST - 2006	\$453,032.00

Capital Funds Program Five Year Action Plan

Part II: Supporting Pages--Work Activities

11/16/2004

Activities for Year: 3 FFY Grant: 2007 PHA FY: 2007				Activities for Year: 3 FFY Grant: 2007 PHA FY: 2007		
Activities for Year 1	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
2005						
See		Funds for Operations	67,955.00	HA-Wide	Replace 2 maintenance trucks	30,000.00
		Total	67,955.00		Total	30,000.00
		Management Improvements:			TOTAL HA-WIDE	209,970.00
		Resident Initiatives Assistant	18,510.00			
		Benefits	7,420.00	TX078001H	New Vinyl Flooring	148,490.00
Annual		Staff Training		Hoard Site	HOARD SITE TOTAL	148,490.00
		Occupancy & Lease Enforcement Training	1,200.00			
		Board of Commissioners	1,500.00	TX078001SC	Foundation Repair	7,570.00
		Maintenance Technical	900.00	Scott Circle		
		General Technical Assistance	8,350.00		SCOTT CIRCLE TOTAL	7,570.00
		Update Automated Systems-Software	2,000.00			
Statement		Resident Training:		TX078001SS	New Vinyl Flooring (Phase I of II)	87,002.00
		Self-Sufficiency Classes	2,200.00	Scattered Sites		
					SCATTERED SITES TOTAL	87,002.00
		Total	42,080.00			
		Administration:				
		Clerk of the Works	20,235.00			
		Prorated Salaries	3,090.00			
		Benefits	11,110.00			
		Total	34,435.00			
		Fees and Costs:				
		A/E Services	28,500.00			
		Inspection Costs	1,000.00			
		Printing Costs	1,000.00			
		Consultant Fees Annual Plan	5,000.00			
		Total	35,500.00		TOTAL CFP ESTIMATED COST - 2007	\$453,032.00

Capital Funds Program Five Year Action Plan

Part II: Supporting Pages--Work Activities

11/16/2004

Activities for Year: 4 FFY Grant: 2008 PHA FY: 2008				Activities for Year: 4 FFY Grant: 2008 PHA FY: 2008		
2005	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See		Funds for Operations	67,955.00	HA-Wide	Lawn Mower	5,000.00
		Total	67,955.00		Weed Eaters	500.00
		Management Improvements:			Total	5,500.00
		Resident Initiatives Assistant	19,250.00		TOTAL HA-WIDE	188,415.00
		Benefits	7,550.00			
Annual		Staff Training		TX078001H	Water Heater Insulation	11,800.00
		Occupancy & Lease Enforcement Training	1,200.00	Hoard Site	Interior Painting	25,000.00
		Board of Commissioners	1,500.00		Bathroom & Dining Room Light Fixtures	18,000.00
		Maintenance Technical	900.00		HOARD SITE TOTAL	54,800.00
		General Technical Assistance	5,600.00			
		Update Automated Systems-Software	2,000.00	TX078001SC	Install Vinyl Flooring	128,355.00
Statement		Utility Allowance Study	2,000.00	Scott Circle		
		Resident Training:			SCOTT CIRCLE TOTAL	128,355.00
		Self-Sufficiency Classes	2,200.00			
		Total	42,200.00			
				TX078001SS	Install Vinyl Flooring (Phase II of II)	11,122.00
		Administration:		Scattered Sites	Window Replacements	63,306.00
		Clerk of the Works	21,250.00		Begin Repair/Refinish Kitchen Cabinets	7,034.00
		Prorated Salaries	1,590.00		SCATTERED SITES TOTAL	81,462.00
		Benefits	14,420.00			
		Total	37,260.00			
		Fees and Costs:				
		A/E Services	28,500.00			
		Inspection Costs	1,000.00			
		Printing Costs	1,000.00			
		Consultant Fees Annual Plan	5,000.00			
		Total	35,500.00		TOTAL CFP ESTIMATED COST - 2008	\$453,032.00

Capital Funds Program Five Year Action Plan

Part II: Supporting Pages--Work Activities

11/16/2004

Activities for Year: 5 FFY Grant: 2009 PHA FY: 2009				Activities for Year: 5 FFY Grant: 2009 PHA FY: 2009		
2005	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See		Funds for Operations	67,955.00	HA-Wide	Water Heaters	2,000.00
		Total	67,955.00		Refrigerators	3,000.00
		Management Improvements:			Total	5,000.00
		Resident Initiatives Assistant	20,210.00		TOTAL HA-WIDE	189,935.00
		Benefits	7,550.00			
Annual		Staff Training		TX078001H	Window Replacements	80,185.00
		Occupancy & Lease Enforcement Training	1,200.00	Hoard Site	Begin Repair/Refinish Kitchen Cabinets	8,909.00
		Board of Commissioners	1,500.00		HOARD SITE TOTAL	89,094.00
		Maintenance Technical	900.00			
		General Technical Assistance	5,600.00	TX078001SC	Window Replacements	113,903.00
		Update Automated Systems-Software	2,000.00	Scott Circle	Begin Repair/Refinish Kitchen Cabinets	12,655.00
Statement		Utility Allowance Study	2,000.00		SCOTT CIRCLE TOTAL	126,558.00
		Resident Training:				
		Self-Sufficiency Classes	2,200.00	TX078001SS	Window Replacements	42,701.00
		Total	43,160.00	Scattered Sites	Continue with Repair/Refinish Kitchen Cabinets	4,744.00
					SCATTERED SITES TOTAL	47,445.00
		Administration:				
		Clerk of the Works	22,310.00			
		Prorated Salaries	1,590.00			
		Benefits	14,420.00			
		Total	38,320.00			
		Fees and Costs:				
		A/E Services	28,500.00			
		Inspection Costs	1,000.00			
		Printing Costs	1,000.00			
		Consultant Fees Annual Plan	5,000.00			
		Total	35,500.00		TOTAL CFP ESTIMATED COST - 2009	\$453,032.00

CAPITAL FUND PROGRAM TABLES START HERE

tx078g01

Annual Statement /Performance and Evaluation Report

11/9/2004

Capital Funds Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary

PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21P078501-04 Replacement Housing Factor Grant No:		Federal FY of Grant: 2004	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserved for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement/Revision Number _____ <input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 9/30/04 <input type="checkbox"/> Final Performance and Evaluation Report for Program Year Ending _____					

Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost	
		Original	Revised	Obligated	Expended
1	Total Non-Capital Funds				
2	1406 Operating Expenses	78,235.00		(Drawn 10/04) 78,235.00	0.00
3	1408 Management Improvements	39,110.00		0.00	0.00
4	1410 Administration	38,800.00		0.00	0.00
5	1411 Audit				
6	1415 Liquidated Damages				
7	1430 Fees and Costs	35,500.00		0.00	0.00
8	1440 Site Acquisition				
9	1450 Site Improvement	26,125.00		0.00	0.00
10	1460 Dwelling Structures	126,414.00		0.00	0.00
11	1465.1 Dwelling Equipment-Nonexpendable	23,000.00		0.00	0.00
12	1470 Nondwelling Structures				
13	1475 Nondwelling Equipment	24,000.00		0.00	0.00
14	1485 Demolition				
15	1490 Replacement Reserve				
16	1492 Moving to Work Demonstration				
17	1495.1 Relocation Costs				
18	1499 Development Activities				
19	1501 Collateralization or Debt Service				
20	1502 Contingency				
21	Amount of Annual Grant (sums of lines 2-20)	\$391,184.00		\$78,235.00	\$0.00
22	Amount of line 21 Related to LBP Activities				
23	Amount of Line 21 Related to Section 504 Compliance				
24	Amount of Line 21 Related to Security - Soft Costs				
25	Amount of Line 21 Related to Security - Hard Costs				
26	Amount of Line 21 Related to Energy Conservation Measures				

Annual Statement/Performance and Evaluation Report and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

11/9/2004

PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21P078501-04 Replacement Housing Factor Grant No:						Federal FY of Grant: 2004
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-Wide	Operating Expenses	1406		78,235.00		78,235.00	0.00	(Drawn 10/04)
	Total			78,235.00		78,235.00	0.00	
HA-Wide	Management Improvements							
	Resident Initiatives Assistant	1408		16,450.00		0.00	0.00	
	Benefits	1408		7,260.00		0.00	0.00	
	Staff Training:							
	Occupancy & Lease Enforcement Training	1408		1,200.00		0.00	0.00	
	Board of Commissioners	1408		1,500.00		0.00	0.00	
	Maintenance Technical	1408		900.00		0.00	0.00	
	General Technical Assistance	1408		5,600.00		0.00	0.00	
	Update Automated Systems-Software	1408		2,000.00		0.00	0.00	
	Utility Allowance Study	1408		2,000.00		0.00	0.00	
	Resident Training:							
	Self-Sufficiency Classes	1408		2,200.00		0.00	0.00	
	Total			39,110.00		0.00	0.00	
HA-Wide	Administration							
	Clerk of the Works	1410		19,700.00		0.00	0.00	
	Prorated Salaries	1410		7,850.00		0.00	0.00	
	Benefits	1410		11,250.00		0.00	0.00	
	Total			38,800.00		0.00	0.00	
HA-Wide	Fees and Costs							
	A/E Services	1430		26,150.00		0.00	0.00	
	Inspection Costs	1430		3,350.00		0.00	0.00	
	Printing Costs	1430		1,000.00		0.00	0.00	
	Consultant Fees Annual Plan	1430		5,000.00		0.00	0.00	
	Total			35,500.00		0.00	0.00	

Annual Statement/Performance and Evaluation Report and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

11/9/2004

PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21P078501-04 Replacement Housing Factor Grant No:						Federal FY of Grant: 2004
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
Hoard Site	Site Improvement:							
TX078001H	Landscaping	1450		7,500.00		0.00	0.00	
	Total			7,500.00		0.00	0.00	
	Dwelling Structures:							
	Upgrade Electrical System (Phase II of II)	1460		50,000.00		0.00	0.00	
	Caulk/Weatherstrip Windows	1460		9,300.00		0.00	0.00	
	Water Heaters	1460		2,000.00		0.00	0.00	
	Siding/Exterior Paint	1460		17,756.00		0.00	0.00	
	Interior Painting	1460		17,389.00		0.00	0.00	
	Waterproof Upstairs Bathroom Floors	1460		5,200.00		0.00	0.00	
	Total			101,645.00		0.00	0.00	
Scott Circle Site	Dwelling Structures							
TX078001SC	Paint Interiors	1460		5,150.00		0.00	0.00	
	Total			5,150.00		0.00	0.00	
TX078001SS	Site Improvements:							
Scattered Sites	Sewer Caps with Concrete Platforms	1450		10,625.00		0.00	0.00	
	Replace Master Water Meter	1450		8,000.00		0.00	0.00	
	Total			18,625.00		0.00	0.00	
	Dwelling Structures:							
	Caulk/Weatherstrip Windows	1460		6,000.00		0.00	0.00	
	Interior Painting	1460		12,419.00		0.00	0.00	
	Waterproof Upstairs Bathroom Floors	1460		1,200.00		0.00	0.00	
	Total			19,619.00		0.00	0.00	
HA-Wide	Dwelling Equipment							
	Replace Stoves	1465		23,000.00		0.00	0.00	
	Total			23,000.00		0.00	0.00	
HA-Wide	Nondwelling Equipment							
	Computer Hardware	1475		4,000.00		0.00	0.00	
	Copier	1475		5,000.00		0.00	0.00	
	Replace Truck	1475		15,000.00		0.00	0.00	
	Total			24,000.00		0.00	0.00	
xls/Nelrod	TOTAL ESTIMATED GRANT FOR 2004			\$391,184.00		\$78,235.00	\$0.00	

Annual Statement/Performance and Evaluation Report and Evaluation Report Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule		11/9/2004
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11/9/2004

PHA Name: Housing Authority of the City of Sherman				Grant Type and Number: Capital Fund Program No: TX21P078501-04 Replacement Housing Factor Grant No:			Federal FY of Grant: 2004
Development Number Name/HA-Wide Activities	All Funds Obligated (Quarter Ending Date)			All Funds Expended (Quarter Ending Date)			Reasons for Revised Target Dates
	Original	Revised	Actual	Original	Revised	Actual	
HA-Wide	9/13/2006			9/13/2008			In accordance with eLOCCS report
Hoard Site	9/13/2006			9/13/2008			In accordance with eLOCCS report
Scott Circle Site	9/13/2006			9/13/2008			In accordance with eLOCCS report
Scattered Sites	9/13/2006			9/13/2008			In accordance with eLOCCS report
xls/Nelrod							

CAPITAL FUND PROGRAM TABLES START HERE

tx078h01

Annual Statement /Performance and Evaluation Report						11/10/2004
Capital Funds Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary						
PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21P078501-03 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserved for Disasters/Emergencies <input checked="" type="checkbox"/> Revised Annual Statement/Revision Number <u> 2 </u> <input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 9/30/04 <input type="checkbox"/> Final Performance and Evaluation Report for Program Year Ending _____						
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost		
		Original	Revised	Obligated	Expended	
1	Total Non-Capital Funds					
2	1406 Operating Expenses	44,945.00	44,945.00	44,945.00	44,945.00	
3	1408 Management Improvements	32,795.00	32,795.00	30,010.25	29,461.14	
4	1410 Administration	37,740.00	37,740.00	37,740.00	24,165.70	
5	1411 Audit					
6	1415 Liquidated Damages					
7	1430 Fees and Costs	41,020.00	41,020.00	27,582.87	19,542.66	
8	1440 Site Acquisition					
9	1450 Site Improvement	18,729.00	18,729.00	18,612.00	9,673.00	
10	1460 Dwelling Structures	166,685.00	166,685.00	32,646.15	4,500.00	
11	1465.1 Dwelling Equipment-Nonexpendable	2,190.00	2,195.00	2,195.00	2,195.00	
12	1470 Nondwelling Structures	32,080.00	32,080.00	32,080.00	19,918.35	
13	1475 Nondwelling Equipment	15,000.00	14,995.00	11,696.00	11,696.00	
14	1485 Demolition					
15	1490 Replacement Reserve					
16	1492 Moving to Work Demonstration					
17	1495.1 Relocation Costs					
18	1499 Development Activities					
19	1501 Collateralization or Debt Service					
20	1502 Contingency					
21	Amount of Annual Grant (sums of lines 2-20)	\$391,184.00	\$391,184.00	\$237,507.27	\$166,096.85	
22	Amount of line 21 Related to LBP Activities					
23	Amount of Line 21 Related to Section 504 Compliance					
24	Amount of Line 21 Related to Security - Soft Costs					
25	Amount of Line 21 Related to Security - Hard Costs					
26	Amount of Line 21 Related to Energy Conservation Measures					

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

11/10/2004

Part II: Supporting Pages

PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21P07850103 Replacement Housing Factor Grant No:						Federal FY of Grant: 2003
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
HA-Wide	Operating Expenses	1406		44,945.00	44,945.00	44,945.00	44,945.00	
	Total			44,945.00	44,945.00	44,945.00	44,945.00	100% Complete
HA-Wide	Management Improvements							
	Resident Initiatives Assistant	1408		15,815.00	15,815.00	15,815.00	14,934.64	
	Benefits	1408		6,580.00	6,580.00	6,580.00	6,991.25	
	Staff Training:							
	Occupancy & Lease Enforcement Training	1408		1,200.00	1,200.00	1,200.00	1,200.00	
	Board of Commissioners	1408		1,500.00	0.00	0.00	0.00	
	Maintenance Technical	1408		900.00	900.00	0.00	0.00	
	General Technical Assistance	1408		2,600.00	2,673.63	2,673.63	2,673.63	
	Update Automated Systems-Software	1408		2,000.00	3,426.37	3,321.62	3,321.62	
	Resident Training: Self-Sufficiency Classes	1408		2,200.00	2,200.00	420.00	340.00	
	Housekeeping	1408		0.00	0.00	0.00	0.00	
	Homeownership	1408		0.00	0.00	0.00	0.00	
	Total			32,795.00	32,795.00	30,010.25	29,461.14	90% Complete
HA-Wide	Administration							
	Clerk of the Works	1410		18,940.00	25,735.00	25,735.00	16,866.18	
	Prorated Salaries	1410		7,550.00	0.00	0.00	0.00	
	Benefits	1410		11,250.00	12,005.00	12,005.00	7,299.52	
	Total			37,740.00	37,740.00	37,740.00	24,165.70	64% Complete
HA-Wide	Fees and Costs							
	A/E Services	1430		20,620.00	20,620.00	20,620.00	16,496.00	
	Inspection Costs	1430		1,000.00	1,000.00	0.00	0.00	
	Printing Costs	1430		1,000.00	1,000.00	916.13	916.13	
	Consultant Fees Annual Plan	1430		5,000.00	5,000.00	3,046.74	2,130.53	
	Physical Needs Assessment/Energy Audit	1430		13,400.00	13,400.00	3,000.00	0.00	
	Total			41,020.00	41,020.00	27,582.87	19,542.66	48% Complete

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

11/10/2004

Part II: Supporting Pages

PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21P078501-03 Replacement Housing Factor Grant No:						Federal FY of Grant: 2003
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original	Revised	Funds Obligated	Funds Expended	
	Site Improvement							
HA-Wide	Sidewalk/Driveway Repair	1450		4,000.00	2,700.00	2,700.00	2,700.00	
HA-Wide	Maintenance Parking Lot Expansion	1450		8,939.00	8,939.00	8,939.00	0.00	
HA-Wide	Landscaping	1450		3,500.00	3,092.00	2,975.00	2,975.00	
HA-Wide	Exterior Lighting	1450		2,290.00	0.00	0.00	0.00	
Scott Circle Site	Replace Sewer Manhole	1450		0.00	3,998.00	3,998.00	3,998.00	Emergency work added
	Total			18,729.00	18,729.00	18,612.00	9,673.00	52% Complete
	Dwelling Structures							
TX078001H	Upgrade Electrical System (Phase I of II)	1460		83,200.00	83,200.00	0.00	0.00	
Hoard Site	Waterproof Bathroom Floors (26)	1460		0.00	0.00	0.00	0.00	Moved to CFP 2004
	Total			83,200.00	83,200.00	0.00	0.00	
TX078001SC	Paint Interiors (Phase I)	1460		0.00	0.00	0.00	0.00	Completed in CFP 2002
Scott Circle Site	Entry Doors w/Hardware (Phase II of II)	1460		8,385.00	8,385.00	8,385.00	0.00	
	Caulk/Weatherstrip Windows	1460		7,900.00	7,900.00	7,900.00	0.00	
	Total			16,285.00	16,285.00	16,285.00	0.00	
TX078001SS	Waterproof Bathroom Floors (6)	1460		0.00	0.00	0.00	0.00	Moved to CFP 2004
Scattered Sites	Roofing Shingle (Phase I)	1460		0.00	0.00	0.00	0.00	Not Needed - Insurance Paid
	Upgrade Electrical System	1460		60,800.00	49,238.85	0.00	0.00	
	Ceiling Fans (Phase II of II)	1460		6,400.00	11,861.15	11,861.15	0.00	
	Termite Treatment	1460		0.00	6,100.00	4,500.00	4,500.00	Moved up from 5-year plan
	Total			67,200.00	67,200.00	16,361.15	4,500.00	7% Complete
TX078001H	Nondwelling Structures							
Hoard Site	Laundry Room Facility	1470		32,080.00	32,080.00	32,080.00	19,918.35	
	Total			32,080.00	32,080.00	32,080.00	19,918.35	62% Complete
HA-Wide	Dwelling Equipment:							
	Replace Stoves	1465		2,190.00	2,195.00	2,195.00	2,195.00	
	Total			2,190.00	2,195.00	2,195.00	2,195.00	100% Complete
HA-Wide	Nondwelling Equipment							
	Replace Maintenance Truck	1475		15,000.00	11,696.00	11,696.00	11,696.00	
	Office Filing Cabinets/Furniture	1475		0.00	3,299.00	0.00	0.00	Moved up from 5-year plan
	Total			15,000.00	14,995.00	11,696.00	11,696.00	
xls/Nelrod	TOTAL GRANT FOR 2003			\$391,184.00	\$391,184.00	\$237,507.27	\$166,096.85	42% Complete

Part III: Implementation Schedule

PHA Name:

Grant Type and Number:

Replacement Housing Factor Grant No:

Federal FY of Grant:

Development Number

All Funds Obligated

Name/HA-Wide

(Quarter Ending Date)

Activities

All Funds Expended

(Quarter Ending Date)

Original

Revised

Actual

Reasons for Revised Target Dates

Original

Revised

Actual

HA-Wide

9/16/2005

Hoard Site

9/16/2005

Scott Circle Site

9/16/2005

Scattered Sites

9/16/2005

9/16/2007

9/16/2007

9/16/2007

9/16/2007

In accordance with PIH Notice 2003-19

CAPITAL FUND PROGRAM TABLES START HERE

tx078i01

Annual Statement /Performance and Evaluation Report						10/21/2004
Capital Funds Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary						
PHA Name: Housing Authority of the City of Sherman "Set-Aside Supplemental Funds"		Grant Type and Number: Capital Fund Program No: TX21P078502-03 Replacement Housing Factor Grant No:			Federal FY of Grant: 2003	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserved for Disasters/Emergencies <input type="checkbox"/> Revised Annual Statement/Revision Number _____ <input type="checkbox"/> Performance and Evaluation Report for Program Year Ending _____ <input type="checkbox"/> Final Performance and Evaluation Report for Program Year Ending _____						
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost		
		Original	Revised	Obligated	Expended	
1	Total Non-Capital Funds					
2	1406 Operating Expenses					
3	1408 Management Improvements					
4	1410 Administration					
5	1411 Audit					
6	1415 Liquidated Damages					
7	1430 Fees and Costs					
8	1440 Site Acquisition					
9	1450 Site Improvement					
10	1460 Dwelling Structures	24,948.00		24,948.00	0.00	
11	1465.1 Dwelling Equipment-Nonexpendable					
12	1470 Nondwelling Structures	53,013.00		53,013.00	0.00	
13	1475 Nondwelling Equipment					
14	1485 Demolition					
15	1490 Replacement Reserve					
16	1492 Moving to Work Demonstration					
17	1495.1 Relocation Costs					
18	1499 Development Activities					
19	1501 Collateralization or Debt Service					
20	1502 Contingency					
21	Amount of Annual Grant (sums of lines 2-20)	\$77,961.00		\$77,961.00	\$0.00	
22	Amount of line 21 Related to LBP Activities					
23	Amount of Line 21 Related to Section 504 Compliance					
24	Amount of Line 21 Related to Security - Soft Costs					
25	Amount of Line 21 Related to Security - Hard Costs					
26	Amount of Line 21 Related to Energy Conservation Measures					

10/21/2004

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Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part III: Implementation Schedule

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CAPITAL FUND PROGRAM TABLES START HERE

tx078j01

Annual Statement /Performance and Evaluation Report						10/11/2004
Capital Funds Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF) Part 1: Summary						
PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21PO7850102 Replacement Housing Factor Grant No:			Federal FY of Grant: 2002	
<input type="checkbox"/> Original Annual Statement <input type="checkbox"/> Reserved for Disasters/Emergencies <input checked="" type="checkbox"/> Revised Annual Statement/Revision Number <u> 1 </u> <input checked="" type="checkbox"/> Performance and Evaluation Report for Program Year Ending 9/30/04 <input type="checkbox"/> Final Performance and Evaluation Report for Program Year Ending _____						
Line No.	Summary by Development Account	Total Estimated Cost		Total Actual Cost		
		Original	Revised	Obligated	Expended	
1	Total Non-Capital Funds					
2	1406 Operating Expenses					
3	1408 Management Improvements	37,228.00	34,266.16	34,266.16	34,266.16	
4	1410 Administration	33,028.00	33,028.00	33,028.00	33,028.00	
5	1411 Audit	0.00	0.00	0.00	0.00	
6	1415 Liquidated Damages	0.00	0.00	0.00	0.00	
7	1430 Fees and Costs	34,287.00	34,287.00	34,287.00	34,183.21	
8	1440 Site Acquisition	0.00	0.00	0.00	0.00	
9	1450 Site Improvement	80,476.00	80,476.00	80,476.00	80,476.00	
10	1460 Dwelling Structures	251,539.00	254,500.84	254,500.84	254,500.84	
11	1465.1 Dwelling Equipment-Nonexpendable	0.00	5,526.00	5,526.00	5,526.00	
12	1470 Nondwelling Structures	13,881.00	13,881.00	13,881.00	13,881.00	
13	1475 Nondwelling Equipment	25,000.00	19,474.00	19,474.00	19,474.00	
14	1485 Demolition					
15	1490 Replacement Reserve					
16	1492 Moving to Work Demonstration					
17	1495.1 Relocation Costs					
18	1499 Development Activities					
19	1501 Collateralization or Debt Service					
20	1502 Contingency					
21	Amount of Annual Grant (sums of lines 2-20)	\$475,439.00	\$475,439.00	\$475,439.00	\$475,335.21	
22	Amount of line 21 Related to LBP Activities					
23	Amount of Line 21 Related to Section 504 Compliance					
24	Amount of Line 21 Related to Security - Soft Costs					
25	Amount of Line 21 Related to Security - Hard Costs					
26	Amount of Line 21 Related to Energy Conservation Measures					

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

10/11/2004

Part II: Supporting Pages

PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21PO7850102 Replacement Housing Factor Grant No:						Federal FY of Grant: 2002
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original		Funds Obligated	Funds Expended	
HA-Wide	General Technical Assist./PHAS/QHWRA Impr.	1408		3,400.00	3,458.84	3,458.84	3,458.84	
	Staff Training:							
	Board of Commissioners	1408		1,000.00	0.00	0.00	0.00	
	Maintenance Technical	1408		900.00	0.00	0.00	0.00	
	Update Automated Systems:							
	Update Software	1408		4,000.00	4,000.00	3,940.00	3,940.00	
	Resident Training:							
	Housekeeping (Arts/Crafts)	1408		1,000.00	1,573.13	1,633.13	1,633.13	
	Homeownership (Computer)	1408		1,200.00	546.25	546.25	546.25	
	Resident Plan Update	1408		5,500.00	0.00	0.00	0.00	
	Management Improvement Staffing:							
	Resident Initiatives Assistant	1408		14,643.00	14,909.76	14,909.76	14,909.76	
	Benefits	1408		4,385.00	8,224.39	8,224.39	8,224.39	
	Occupancy and Lease Enforcement Training	1408		1,200.00	1,553.79	1,553.79	1,553.79	
	Subtotal			37,228.00	34,266.16	34,266.16	34,266.16	100.00% Completed
HA-Wide	Administration:							
	Clerk of the Works	1410		17,534.00	20,966.00	20,966.00	20,966.00	
	Prorated Salaries	1410		10,234.00	0.00	0.00	0.00	
	Benefits	1410		5,260.00	12,062.00	12,062.00	12,062.00	
	Subtotal			33,028.00	33,028.00	33,028.00	33,028.00	100.00% Completed
HA-Wide	Fees and Costs:							
	A/E Services	1430		25,823.00	25,823.00	25,823.00	25,823.00	
	Inspection Costs	1430		2,464.00	2,464.00	1,875.00	1,875.00	
	Printing Costs	1430		1,000.00	1,052.78	1,110.49	1,110.49	
	Consultant Fees Annual Plan	1430		5,000.00	4,947.22	5,478.51	5,374.72	
	Subtotal			34,287.00	34,287.00	34,287.00	34,183.21	99.70% Completed
	Sub-Total HA-WIDE			104,543.00	101,581.16	101,581.16	101,477.37	

Annual Statement/Performance and Evaluation Report
Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)
Part II: Supporting Pages

10/11/2004

PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21PO7850102 Replacement Housing Factor Grant No:						Federal FY of Grant: 2002
Development Number	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
Name/HA-Wide Activities				Original		Funds Obligated	Funds Expended	
HA-Wide	Dwelling Equipment:	1465						
	Purchase stoves			0.00	5,526.00	5,526.00	5,526.00	
	Subtotal			0.00	5,526.00	5,526.00	5,526.00	100.00% Completed
HA-Wide	Non-Dwelling Structures:							
	Laundry Room/Facility/Storage (Phase II)	1470	617 sf	13,881.00	13,881.00	13,881.00	13,881.00	
	Subtotal			13,881.00	13,881.00	13,881.00	13,881.00	100.00% Completed
HA-Wide	Non-Dwelling Equipment:							
	Replace Community Center Van	1475	1	25,000.00	19,474.00	19,474.00	19,474.00	
	Subtotal			25,000.00	19,474.00	19,474.00	19,474.00	100.00% Completed
	TOTAL HA-WIDE			\$143,424.00	\$140,462.16	\$140,462.16	\$140,358.37	
TX078-001H	Dwelling Structures							
Hoard Site	Painting Interior	1460	44587 sf	17,389.00	0.00	0.00	0.00	Moved to CFP-04
	Roaches & Vermin Treatment	1460	369926 sf	10,709.00	10,490.00	10,490.00	10,490.00	
	Entry Door w/Hardware	1460		0.00	15,881.25	15,881.25	15,881.25	
	Subtotal			\$28,098.00	26,371.25	26,371.25	26,371.25	100.00% Completed
	TOTAL HOARD SITE			\$28,098.00	\$26,371.25	\$26,371.25	\$26,371.25	

Annual Statement/Performance and Evaluation Report

Capital Fund Program and Capital Fund Program Replacement Housing Factor (CFP/CFPRHF)

10/11/2004

Part II: Supporting Pages

PHA Name: Housing Authority of the City of Sherman		Grant Type and Number: Capital Fund Program No: TX21PO7850102 Replacement Housing Factor Grant No:						Federal FY of Grant: 2002
Development Number Name/HA-Wide Activities	General Description of Major Work Categories	Dev. Acct No.	Quantity	Total Estimated Cost		Total Actual Cost		Status of Work
				Original		Funds Obligated	Funds Expended	
TX078-001SC	Site Improvement							
Scott Circle Site	Sidewalk/Patio Repair or Replacement	1450	29997 sf	41,697.00	2,060.00	2,060.00	2,060.00	
	Landscaping (after electrical upgrade)	1450		38,779.00	78,416.00	78,416.00	78,416.00	
	Subtotal			80,476.00	80,476.00	80,476.00	80,476.00	100.00% Completed
	Dwelling Structures							
	Upgrade Electrical System	1460		163,200.00	182,315.93	182,315.93	182,315.93	
	Entry Door w/Hardware - Front	1460	68 ea	16,793.00	7,950.43	7,950.43	7,950.43	
	Entry Door w/Hardware - Rear	1460	68 ea	16,793.00	7,950.42	7,950.42	7,950.42	
	Interior Painting			0.00	24,912.81	24,912.81	24,912.81	
	Subtotal			196,786.00	223,129.59	223,129.59	223,129.59	100.00% Completed
	TOTAL SCOTT CIRCLE SITE			277,262.00	303,605.59	303,605.59	303,605.59	
TX078-001SS	Dwelling Structures							
Scattered Site	Interior painting	1460	30290 sf	12,419.00	0.00	0.00	0.00	<i>Moved to CFP-04</i>
	Ceiling Fans	1460	78 ea	14,236.00	5,000.00	5,000.00	5,000.00	
	Subtotal			26,655.00	5,000.00	5,000.00	5,000.00	100.00% Completed
	TOTAL SCATTERED SITES			26,655.00	5,000.00	5,000.00	5,000.00	
	TOTAL FOR 2002			\$475,439.00	\$475,439.00	\$475,439.00	\$475,335.21	99.98% Completed

10/11/2004